

## **OLLI AT AU STRATEGIC PLAN 2018-2023**

### **SUMMARY**

#### **THE MISSION**

*To provide rich and meaningful educational and intellectual experiences to members by offering a variety of learning opportunities. OLLI at AU is dedicated to the proposition that learning is a lifelong process and that curiosity never retires.*

#### **THE NEED**

OLLI at AU's previous strategic plan was completed in 2012 at a time when the organization had been housed primarily in the Temple Baptist Church for more than 20 years and had added scattered satellite spaces as membership grew. Following the negotiation of a ten-year lease and the Fall 2016 move into American University's modern Spring Valley Building, the OLLI at AU Board of Directors was eager to analyze the long-term growth potential of its membership and programs and the impact of that growth on space and financial stability.

#### **THE PROCESS**

The Board established a Strategic Planning Committee in summer 2016. The committee won a grant for assistance from Compass, a strategic consulting service that provides pro bono management advice to nonprofit clients in the Washington area. The Compass team of nine business consultants provided program and financial analysis during its eight-month engagement.

From October 2017 to May 2018, the Board of Directors, staff, strategic planning team, Compass consultants, and OLLI members developed together the data and analyses that inform the final plan. The work program included interviews with directors of other Osher Institutes as well as AU faculty and senior administrators, analysis of growth scenarios, OLLI member focus groups and surveys, preparation of five-year projections linking growth of budget, membership and classroom space, and market analysis.

#### **WHAT WE LEARNED**

- Focus groups and surveys revealed members love OLLI at AU: 99 percent of respondents report they are "Satisfied" or "Very Satisfied." Most members are comfortable with the current academic and social program, membership size, facility, and academic calendar, but are open to some change.
- In recent years, OLLI at AU membership has grown between 4 percent and 6 percent annually, and an April 2018 survey revealed that most members are comfortable with this rate of growth.
- The 10-year lease with AU includes use of six classrooms with seating capacity ranging from 20 to 30, a lecture hall with 105 seats, social gathering spaces and administrative offices. The use of classroom and lecture spaces is shared with AU and they are generally available to OLLI from 9:45 AM to 3:15 PM, Monday through Friday, twelve months a year.
- An analysis of classroom utilization during the past year revealed that OLLI at AU was operating at 82 percent to 86 percent capacity, leaving between 368 and 467 seats available in some classes each semester. In addition, the expanded OLLI academic calendar still leaves classrooms unused for part of the year.
- American University is itself pressed for space to accommodate its growing number of students and programs and has been working to maximize its own use of classroom space by extending the daily class schedule and the academic calendar.

- A strong, collaborative relationship with American University is essential for the continued success of OLLI at AU as it seeks to strengthen its academic program and grow its membership.
- In recent years, OLLI at AU expenses have climbed faster than revenues and net asset growth has slowed. If tuition is to remain affordable, the OLLI at AU program and facility maintained at current high levels, and the reserve fund increased to meet future needs, new revenue sources will have to be tapped.

## THE GOALS AND SELECTED IMPLEMENTATION STRATEGIES

- **MEMBERSHIP GROWTH** *Welcome lifelong learners in the Washington, DC area who seek to join the OLLI at AU community, manage sustainable growth to reflect financial and space constraints, develop strategies to expand the diversity of the OLLI membership, and maintain the sense of community along with growth.*
  - Develop market efforts, test extending class schedule, raise awareness of OLLI within and beyond the AU community, offer scholarship, expand partnerships with academic, community, and civic organizations to advance inclusiveness and expand impact
- **SPACE** *Seek to accommodate moderate membership growth in the Spring Valley Building with all classroom, office, lecture and social spaces offering a modern, technology-equipped, and welcoming environment.*
  - Maximize use of classrooms by extending the academic calendar, expand short format sessions such as Shorts and Minis, grow the Friends of OLLI Fund to ensure future options for space within and beyond the Spring Valley Building if required
- **PROGRAM** *Continue to enhance the “college-like” experience of OLLI at AU and maintain the current high levels of member satisfaction.*
  - Increase support and training for Study Group Leaders, recruit new Study Group Leaders from within and beyond the OLLI at AU community, develop curriculum to focus on broader policy and cultural issues, improve member communication, and structure Curriculum Committee to support a 12-month academic program
- **FINANCIAL MANAGEMENT** *Ensure long-term financial stability that keeps pace with a growing membership, supports an academic program of unrivaled excellence, and grows the Friends of OLLI Fund for future needs.*
  - Establish a Finance Committee to provide greater oversight, provide greater financial transparency
- **FUNDRAISING** *Establish a culture of giving that 1) supports OLLI at AU core programs while keeping tuition affordable; 2) funds special initiatives; 3) grows the Friends of OLLI Fund for future needs.*
  - Prepare a development plan, prepare an annual report to improve outreach to members and donors, extend solicitation to foundation and corporate donors, increase member-donor participation rate to 40 percent, solicit advertising and sponsorships in catalogs, at events, etc.
- **AU RELATIONSHIP** *Build a collaborative partnership with American University that contributes to the shared core principles of academic excellence, lifelong learning, community engagement, and organizational strength.*
  - Recruit additional AU schools/departments/emeritus faculty to participate in the OLLI curriculum, establish programs to acknowledge such participation, consider discounted OLLI membership to AU alumni, expand partnership with Accelerator program

*Revised May 2019*

*N.B. The Board of Directors annually reviews the strategic plan to revise as necessary goals and implementation steps.*

## CONTENTS

### BACKGROUND

- I Brief History of OLLI at AU
- II Strategic Planning Context
- III Critical issues
  - Membership Growth
  - Space
  - Academic Program
  - The OLLI Community
  - Financial Management/Fundraising
  - The OLLI-AU Relationship
- IV Support from Compass
- V Methodology

### THE PLAN

- I Mission
- II Goals
  - Membership Growth
  - Space
  - Program
    - A. Curriculum
    - B. Community
  - Financial Management
  - Fundraising
  - AU Relationship
  - Governance
- III Implementation

### THE 2017-2018 OLLI at AU STRATEGIC PLANNING COMMITTEE

### APPENDICES

1. 2018 Survey of OLLI at AU Members and Study Group Leaders
2. April 2018 Member Focus Group Summaries
3. Osher National Resource Center – *35 Ideas to Help Improve an OLLI's Relationship with Their Host University or College.*
4. Analysis of Three Growth Scenarios
5. Five-Year Growth and Financial Projections
6. Compass Final Report

## BACKGROUND

### I BRIEF HISTORY OF OLLI AT AU

In the fall of 1982, The Institute for Learning in Retirement, the predecessor organization of The Osher Lifelong Learning Institute at American University, opened offering 11 classes for 80 members. It was founded by a small group of retirees and soon-to-be retirees who shopped the idea to several major universities in Washington, DC. American University and its then-President Richard Berendzen embraced the concept and made available use of several classrooms on campus and administrative support.

Based on the concept of members teaching members, the Institute continued to grow in both membership and class offerings. However, the university was running out of space for its own burgeoning enrollment, so in 1989 the Institute for Learning in Retirement, by now a fully independent District of Columbia 501(c)3 nonprofit, headed to the Temple Baptist Church next to the main AU campus where it remained for more than 25 years, eventually adding three satellite locations to accommodate its growth.

In 2005 the Institute for Learning in Retirement was approached by the Osher Foundation and invited to join its growing network of Lifelong Learning Institutes around the country. Established by Bernard Osher, a San Francisco-based philanthropist committed to lifelong learning, the Foundation gave to American University a \$1 million endowment for the benefit of the newly established Osher Institute of Lifelong Learning. When the 1,000-member threshold was crossed in 2014, the Osher Foundation gave a second \$1 million donation to AU.

The second financial gift was contingent on OLLI changing its name to OLLI at AU and reaching a long-term lease agreement with the university for “permanent” space on campus. Negotiations were completed on a 10-year lease and in the fall of 2016, OLLI at AU took up residence in AU’s Spring Valley Building -- with all of its classrooms and offices finally in one modern, functional facility.

### II STRATEGIC PLANNING CONTEXT

The Osher Lifelong Learning Institute at American University produced strategic plans in 2006 and in 2012. At the time the 2006 plan was prepared, the organization was transitioning from The Institute for Learning in Retirement into The Osher Lifelong Learning Institute. Both plans were developed while the organization was housed in the Temple Baptist Church. To a remarkable extent the two previous plans and this current one all address a shared challenge: accommodating a growing membership and program within limited space. In all three plans, the academic program—the central core of the OLLI mission—is characterized as intellectually vibrant, dynamic, and strong. The focus of previous OLLI planners was on managing the inadequate, outdated Temple Baptist Church facility that required satellite locations and the separation of OLLI’s administrative offices from its classrooms.

Following the Fall 2016 move, the OLLI Board of Directors was eager to examine the long-term growth potential in its new home in AU's Spring Valley Building of its membership and programs and the impact of that growth on space and financial stability. The Board and Strategic Planning team were guided by a shared commitment to a rigorous, ambitious academic program that is both affordable and financially sustainable.

### III CRITICAL ISSUES

The Board of Directors and Strategic Committee Planning Committee identified several inter-related key issues that needed to be addressed in the plan:

- Membership growth
- Space to accommodate such growth
- Academic program
- The OLLI community
- Financial management and fundraising
- The OLLI- American University relationship

#### Membership Growth

In recent years, OLLI at AU membership has grown between 4 percent and 6 percent annually, and the April 2018 survey revealed that most members are comfortable with this rate of growth. Historically, the Board of Directors has sought to avoid capping membership as some other OLLIs have been forced to do as a result of space constraints. Directors and the planning team needed to understand the extent to which such growth could be accommodated in the Spring Valley Building.

#### Space

Space requirements are directly tied to membership growth. American University is itself pressed for space to accommodate its own students and programs. Over the course of several months in the winter and spring of 2016, the OLLI Facilities team negotiated vigorously with AU administrators to secure as much space as possible. The resulting 10-year lease includes use of six classrooms with seating capacity ranging from 20 to 30, a lecture hall with 105 seats, and social gathering spaces. The use of these spaces is shared with AU, and they are generally available to OLLI from 9:45 to 3:15, Monday through Friday, twelve months a year. Also included in the lease is office space for the exclusive use of OLLI during normal university business hours.

It was clear to OLLI at AU planners that the new five-year plan should closely analyze the potential for membership and program growth within the Spring Valley Building.

#### Academic Program

As membership grows within the Spring Valley Building, the study group lottery system in which members select their classes is likely to become more competitive. While in recent years, the percentage of members receiving their first or second study group choices has been high, as membership increases, the lottery for study groups will inevitably tighten. As competition increases, more members will probably be registering for their second- or third-choice study groups, in which case it becomes imperative that *all* OLLI offerings are of the highest academic quality. The strategic plan

proposes new steps to recruit study group leaders from both within and outside OLLI and improving training and support of them.

#### The OLLI Community

As OLLI at AU membership increases, it will be important to take steps that preserve the treasured sense of an intellectually and socially vibrant community that has traditionally attracted and retrained loyal members. Board directors recognized the new plan must seek to advance diversity and inclusiveness of both membership and program, provide funding to ensure that the OLLI experience is available to all income levels, and suggest strategies to attract broader audiences, including semi-retired and newly-retired individuals.

#### Financial Management/Fundraising

For much of OLLI at AU's history, its financial condition was strong; budgets were in balance and membership fees combined with earnings from the Osher-established AU endowment generated sufficient surpluses to build a significant reserve fund. In recent years, however, OLLI at AU has transformed from a modest volunteer organization with all the attendant requirements: more professional staff and benefits, technology, financial and legal advice, etc. The move into the Spring Valley Building came with moving costs, higher rent, and capital investments, such as the installation of hearing loops. Expenses climbed and income did not keep pace, requiring the organization to dip into its reserve funds.

In spring 2017, the Board launched a successful fundraising campaign to fill the immediate budget gap, but clearly, long-term financial stability needed to be a focus of the new strategic plan. OLLI planners also recognized that even if membership and program growth could be accommodated in the Spring Valley Building over the five-year life of the plan, it remains open if growth beyond the five-year period could be. Also, the current lease expires in 2026 with automatic renewal unless either party gives notice otherwise. Directors recognized that responsible stewardship requires them to financially prepare the organization for the long term.

#### The OLLI-American University Relationship

During its 25-year residence in the Temple Baptist Church and scattered satellite locations, the OLLI at AU membership had limited awareness of the connection with American University. While the OLLI administrative offices were housed in an AU facility and AU faculty generously volunteered to teach some OLLI classes, in general, many members were not fully aware of the important affiliation with the University.

The move into the Spring Valley Building brought with it a growing awareness that a collaborative, positive relationship could bring significant benefits to both OLLI and AU. During the past year OLLI at AU directors, staff, and members have consciously sought to cultivate this relationship in various ways and with significant success. To the extent possible, given their own space constraints, AU administrators have proven to be flexible, and university schools, departments, and faculty continue to be a pillar of the OLLI academic program. OLLI directors viewed further collaboration with the university and an understanding of AU's forthcoming strategic plan to be an important focus of its own long-term plan.

#### IV SUPPORT FROM COMPASS

OLLI at AU was assisted in its planning work by Compass, a strategic consulting service that provides pro bono management advice to nonprofit clients in the Washington, DC. In a competitive process, OLLI at AU received a grant for assistance with its strategic planning. During their eight-month engagement beginning in the fall of 2017, nine Compass consultants provided program and financial analysis working closely with the OLLI Board, staff, and strategic planning team. Much of the data and analyses referred to in the plan and appended to it are the work of the Compass team and we are deeply indebted to the consultants for their important contribution.

#### V METHODOLOGY

From October 2017 to May 2018, the Board of Directors, staff, strategic planning team, Compass consultants, and OLLI members worked together to develop the data and analyses that inform and are appended to this plan. In addition to numerous brainstorming sessions and small- and large-group meetings, activities included:

- Individual interviews with selected staff and all OLLI at AU Board directors (Compass)
- Joint Board/Strategic Planning team meeting with Steve Thaxton, Director of the Osher National Resource Center, to discuss how other OLLIs in the Osher network have successfully built strong relationships with their universities
- Interviews with directors of 13 other OLLIs in the Osher network, some benchmarked for comparable demographics, to identify best practices in programming, pricing, fundraising, university relationship, etc. (Compass)
- Interviews with ten key American University academic administrators (Compass)
- Market analysis of other options for seniors' continuing education in DC (Compass)
- SWOT analysis of OLLI at AU strengths, weaknesses, opportunities, and threats (Compass)
- Survey of OLLI at AU members and study group leaders
- Three focus groups of new and veteran OLLI at AU members
- Analysis of three growth scenarios
- Preparation of the five-year projections linking growth of budget, membership, and classroom space
- Engagement Overview and Final Report of Findings (Compass)

### THE PLAN

#### I MISSION

Our mission is to provide rich and meaningful educational and intellectual experiences to members by offering a variety of learning opportunities. We are dedicated to the proposition that learning is a lifelong process and that curiosity never retires.

#### II GOALS

The goals outlined below focus on inter-related issues critical to the future growth and strength of OLLI at AU. The plan distinguishes between short-term implementation steps that could be undertaken in

Years 1 or 2 of the plan and longer-term strategies that may need to be considered further or deferred for future action.

## 1. MEMBERSHIP GROWTH

GOAL: Welcome lifelong learners in the Washington, DC area who seek to join the OLLI at AU community, manage sustainable growth to reflect financial and space constraints, develop strategies to expand the diversity of the OLLI membership, and maintain the sense of community despite growth.

### *Short-term implementation steps to be undertaken in years 1 or 2*

Develop a targeted marketing and partnership effort to continue the recent moderate membership growth of between four percent and six percent annually and reach broader audiences.

Through pilot programs, test extending the class schedule to include early morning, late afternoon, weekend, and evening classes to appeal to a broader audience including semi-retired and newly retired individuals.

Partner with the Alumni Office of American University to raise awareness of OLLI among AU alumni (faculty, students, and staff) and explore the feasibility of offering a modest discount. (see *AU Relationship*)

Further test the pilot program that offers first-time members one class post-lottery at a reduced fee.

Offer a well-funded scholarship program to ensure the OLLI experience is available to those at all income levels.

Establish partnerships with academic, community, and civic organizations to advance inclusiveness and expand the impact of OLLI at AU.

### *Longer-term implementation steps or those that require further discussion before pursuing*

Pursue alternative sites to hold one-time lectures, shorts, or mini classes in areas of the city that might attract a more diverse audience.

Explore partnerships to provide OLLI classes at local-area senior centers and retirement communities as a way to grow membership without requiring additional classroom space in the Spring Valley Building.

## 2. SPACE



GOAL: Seek to accommodate moderate membership growth in the Spring Valley Building with all classroom, office, lecture, and social spaces offering a modern, technology-equipped, and welcoming environment.

*Short-term implementation steps to be undertaken in years 1 or 2*

Maximize use of existing classrooms by extending the academic calendar to fully utilize classroom space throughout the entire year.

Continue to expand flexible, short-format sessions such as Shorts and Minis.

If space is available, establish a pilot program for an expanded schedule for existing classrooms potentially offering early morning, late afternoon, evening, and/or weekend classes.

Explore the possibility of leasing additional classrooms in the Spring Valley Building.

Grow the Friends of OLLI Fund to accommodate long-term growth and ensure future options for space within and beyond the Spring Valley Building if required.

3. PROGRAM

GOAL: Continue to enhance the “college-like” experience of OLLI at AU and maintain the current high levels of member satisfaction

A. Curriculum

Goal: Refresh and strengthen the academic program, increase support of Study Group Leaders, and expand the faculty and curriculum to meet the needs of a growing membership with evolving interests.

*Short-term implementation steps to be undertaken in years 1 or 2*

Increase efforts to recruit new Study Group Leaders from within and outside the OLLI at AU community.

Encourage and expand participation by local-area think tanks and policy organizations, museums, cultural centers, and other private sector sources.

Enhance Study Group Leader preparation with training in new techniques for teaching older adults.

Strengthen Study Group Leader evaluation process by reviewing assessment criteria including class enrollment, member feedback, class attendance, and student retention data.

Ensure that the Curriculum Committee is structured to meet the needs of a 12-month academic calendar and to recruit Study Group Leaders from organizations beyond OLLI.

*Longer-term implementation steps or those that require further discussion before pursuing*

Extend the reach of the OLLI at AU programs to older adult learners including those with special needs through technology including streaming of lectures and classes, online learning, etc.

#### B. Community

Goal: Nurture a vibrant intellectual and social community that welcomes and integrates new members, identifies and develops the next generation of OLLI leadership, and provides a variety of opportunities for social interaction

*Short-term implementation steps to be undertaken in years 1 or 2*

Improve communication with members to better inform them of OLLI policy, management, and financial matters, including regular coverage in OLLI newsletters and other electronic and print communication channels.

Evaluate and reform existing methods to recruit, vet, and deploy volunteers and identify next generation of OLLI at AU leadership.

Train Study Group Representatives and Study Group Leaders to serve as effective ambassadors to new members and to encourage a sense of camaraderie both within and outside the classroom.

Establish a “buddy” program for new members as a way to welcome and integrate new arrivals.

#### 4. FINANCIAL MANAGEMENT

GOAL: Ensure long-term financial stability that keeps pace with a growing membership, supports an academic program of unrivaled excellence, and protects the Friends of OLLI Fund for future needs.

*Short-term implementation steps to be undertaken in years 1 or 2*

Establish a Finance Committee that:

- Provides financial oversight, sets long-range goals and funding strategies and
- Designs financial reports that are transparent, timely, and accurate and that can be widely distributed
- Reviews and recommends revisions as needed to the Investment Funds Primer regarding policy, fund spending, and long-term planning of capital expenditures

*Longer-term implementation steps or those that require further discussion before pursuing*

Study financial models of other comparable Osher Institutes to consider possible alternative fee structures.

#### 5. FUNDRAISING

GOAL: Establish a culture of giving that

- supports OLLI at AU core programs while keeping tuition affordable
- funds special initiatives
- grows the Friends of OLLI Fund for future needs

*Short-term implementation steps to be undertaken in years 1 or 2*

Prepare a development plan that makes a clear financial need case statement, sets fundraising goals and budget, and identifies potential funding sources and fundraising activities.

Prepare an annual report and improve communication with members and donors with increased transparency and outreach.

Build fundraising capacity through investment in staff (including hiring AU work-study students), training, and software acquisition.

Extend fundraising solicitation beyond the OLLI membership to foundations, corporate charitable giving, etc.

Solicit appropriate paid sponsorships/partnerships, paid sponsored pages in catalogues, underwriting for major lectures and other events.

Increase member-donor participation rate from current 22 percent to 40 percent.

Hire a professional consultant to undertake prospect research, advise on marketing, etc.

## 6. AU RELATIONSHIP

GOAL: Build a collaborative partnership with American University that contributes to the shared core principles of academic excellence, lifelong learning, community engagement, and organizational strength

*Short-term implementation steps to be undertaken in years 1 or 2*

Strengthen ties to AU schools, departments, and faculty

- Recruit additional AU schools/departments to participate in the OLLI program.
- Explore with senior university administrators and heads of AU schools and departments possible steps to support, acknowledge, and expand faculty participation in the OLLI academic program.
- Feature AU faculty as OLLI lecturers and recruit AU emeritus faculty as OLLI Study Group Leaders.
- Organize OLLI events/tours/trips to AU campus facilities, e.g., museum, arboretum and gardens, new science & technology building, rare books collection, AU Corcoran art collection, etc.

Engage AU students, faculty and alumni

- Support and expand the International Accelerator/OLLI conversation and cultural exchange program.
- Hire AU work-study students in OLLI office.
- Explore establishing an OLLI/AU student mentoring program.
- Recruit AU graduate students as Study Group Leaders.
- Reach out to retiring and retired faculty, alumni, and staff to become OLLI members and SGLs.
- Offer a discounted OLLI membership to AU alumni (see *Membership Growth*)

Develop collegial, working relationships with AU administrators at all levels

- Co-ordinate OLLI and AU strategic plans to the extent possible.
- Identify a senior AU administrator to be a point of regular contact for OLLI-AU issues.
- Develop garage parking permit system for OLLI members.

*Longer-term implementation steps or those that require further discussion before pursuing*  
Seek to involve OLLI members in AU boards and committee

## 7. GOVERNANCE

GOAL: Ensure that the composition, structure, and terms of the Board of Directors reflect the skills, resources, and engagement necessary to provide the overall strategic leadership of OLLI at AU.

*Short-term implementation steps to be undertaken in years 1 or 2*

- Establish a working group to review OLLI at AU bylaws.
- Strengthen the OLLI at AU committee function to better structure and manage the work of the Board.

## III IMPLEMENTATION

To avoid the “gathering dust on the shelf” fate of most strategic plans, this plan will be subject to annual review by the Board of Directors and an ad hoc Strategic Planning Committee. Each year Board and committee members will review progress in meeting goals, recommend revisions to the plan, and identify additional implementation steps.

### THE 2017-2018 OLLI AT AU STRATEGIC PLANNING COMMITTEE

Denise Liebowitz Chair

John Aldock

Myra Barron

Alber Cheh

Lewis Cohen

Martha Cutts

Judy Havemann

Tina Fried Heller

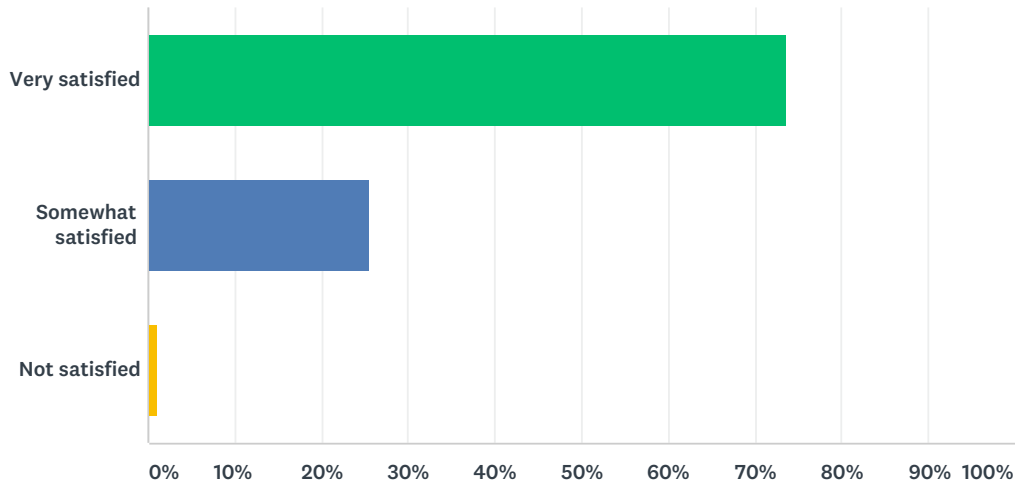
David Hensler  
John Thorner

*Revised May 2019*

*N.B. The Board of Directors annually reviews the strategic plan to revise as necessary goals and implementation steps*

## Q1 How satisfied are you with the range of study groups offered?

Answered: 527 Skipped: 0

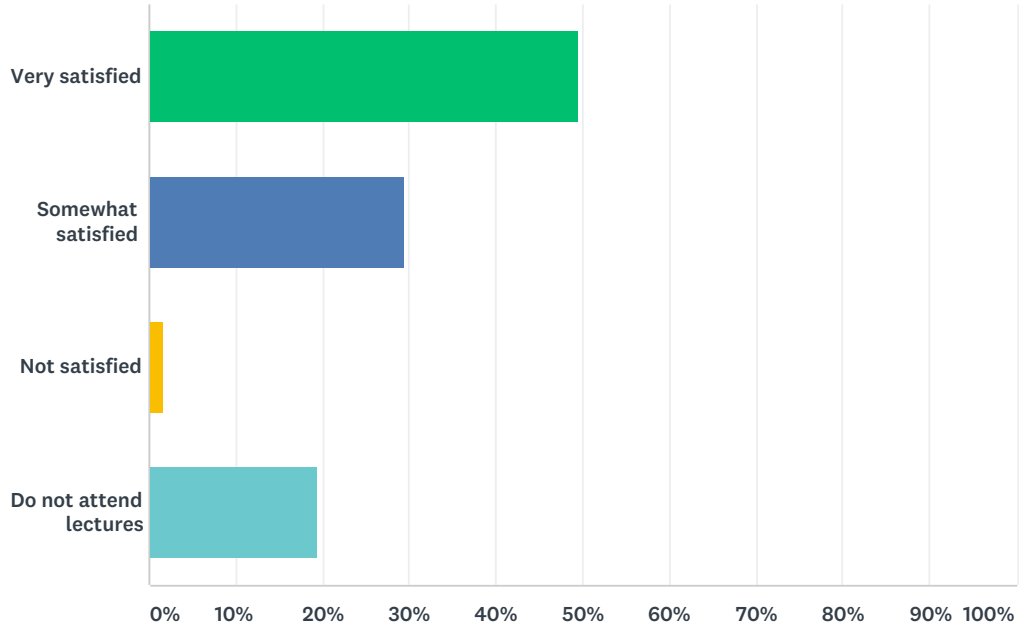


ANSWER CHOICES	RESPONSES	
Very satisfied	73.62%	388
Somewhat satisfied	25.43%	134
Not satisfied	0.95%	5
TOTAL		527

## Q2 How satisfied are you with the range of topics covered in the lecture series?

Answered: 527 Skipped: 0

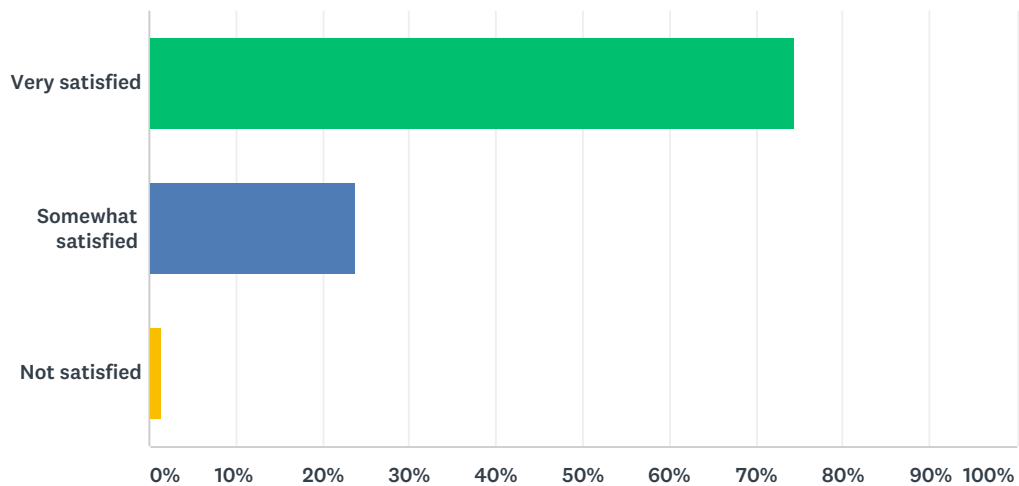
### Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
Very satisfied	49.53%	261
Somewhat satisfied	29.41%	155
Not satisfied	1.71%	9
Do not attend lectures	19.35%	102
<b>TOTAL</b>		<b>527</b>

### Q3 How satisfied are you with the overall OLLI academic experience?

Answered: 527 Skipped: 0

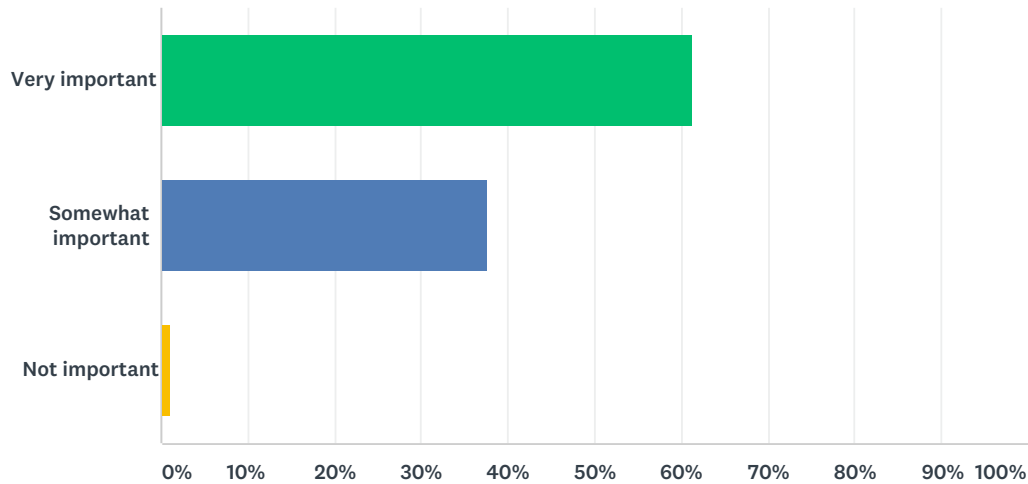


ANSWER CHOICES	RESPONSES	
Very satisfied	74.57%	393
Somewhat satisfied	23.91%	126

Not satisfied	1.52%	8
TOTAL		527

### Q4 How important is OLLI to you?

Answered: 527 Skipped: 0



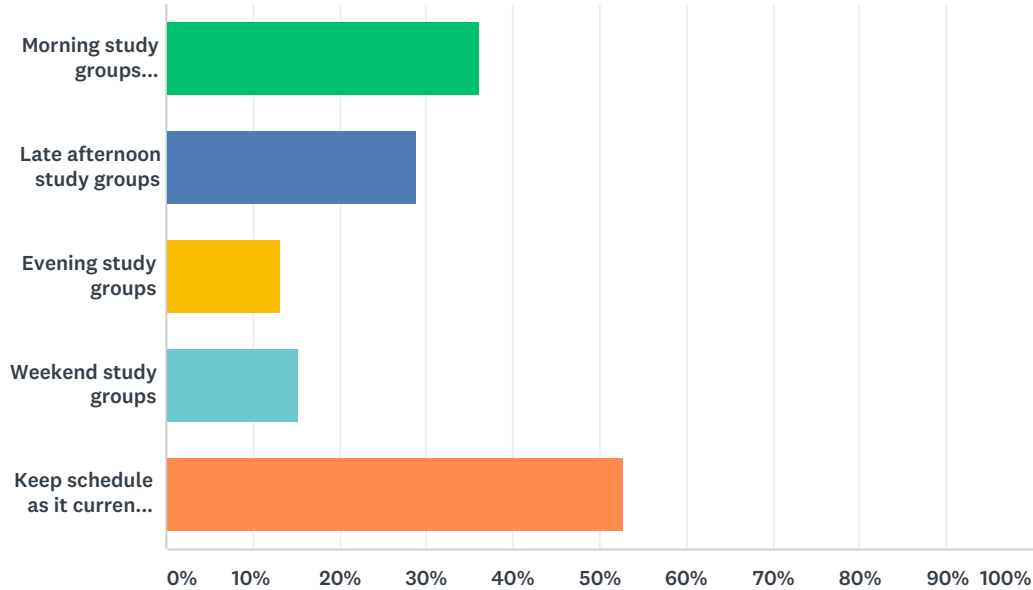
ANSWER CHOICES	RESPONSES	
Very important	61.29%	323
Somewhat important	37.57%	198
Not important	1.14%	6
TOTAL		527

### Q5 If classrooms were available, would you be interested in attending (Check all that apply)

Answered: 464 Skipped: 63



### Copy of Strategic Planning Member and Study Group Leader Survey

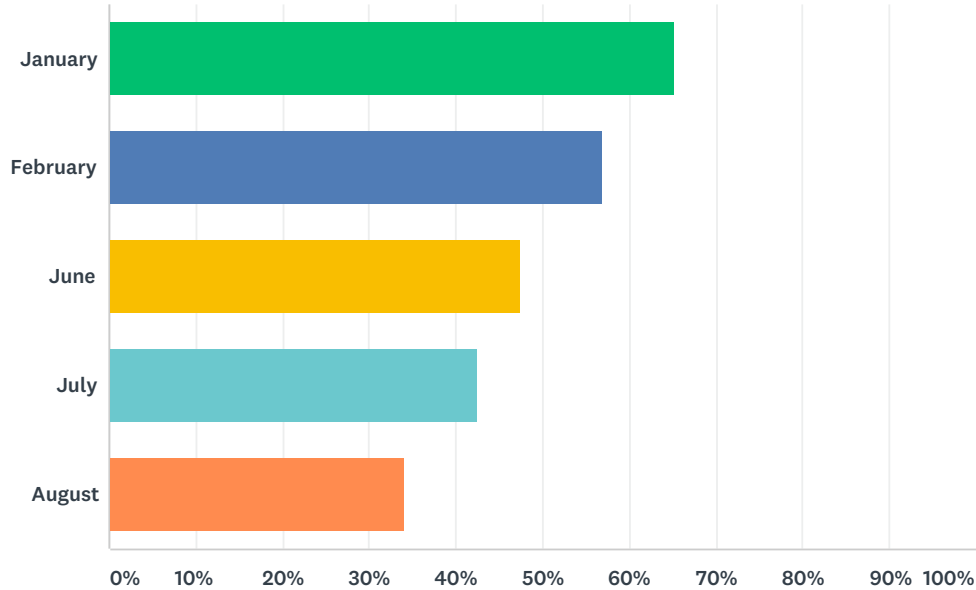


ANSWER CHOICES	RESPONSES	
Morning study groups beginning at 9:15 AM	36.21%	168
Late afternoon study groups	28.88%	134
Evening study groups	13.15%	61
Weekend study groups	15.30%	71
Keep schedule as it currently is	52.80%	245
Total Respondents: 464		

**Q6 In addition to the current 8-10-week fall and spring study groups, February Shorts, and the June Minis, would you be interested in attending additional study groups in (Check all that apply):**

Answered: 320 Skipped: 207

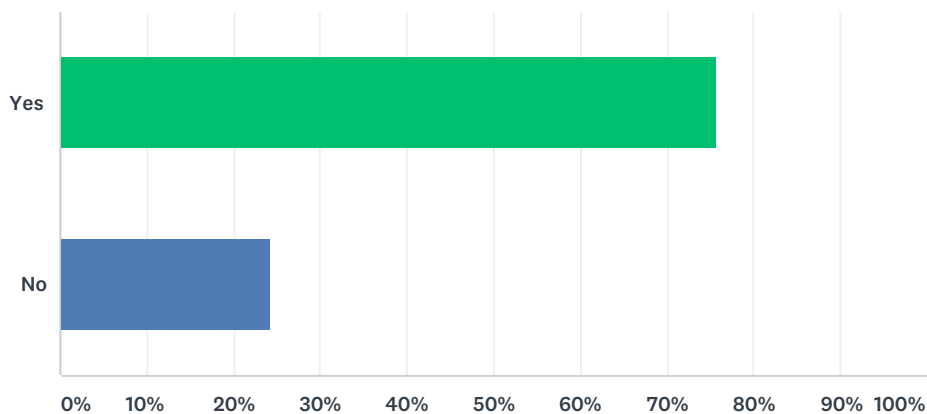
### Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
January	65.31%	209
February	56.88%	182
June	47.50%	152
July	42.50%	136
August	34.06%	109
Total Respondents: 320		

**Q7 In addition to the regular 8-, 9-, and 10-week courses, would you be interested in taking a limited number of 5-week courses during the regular academic semesters?**

Answered: 527 Skipped: 0

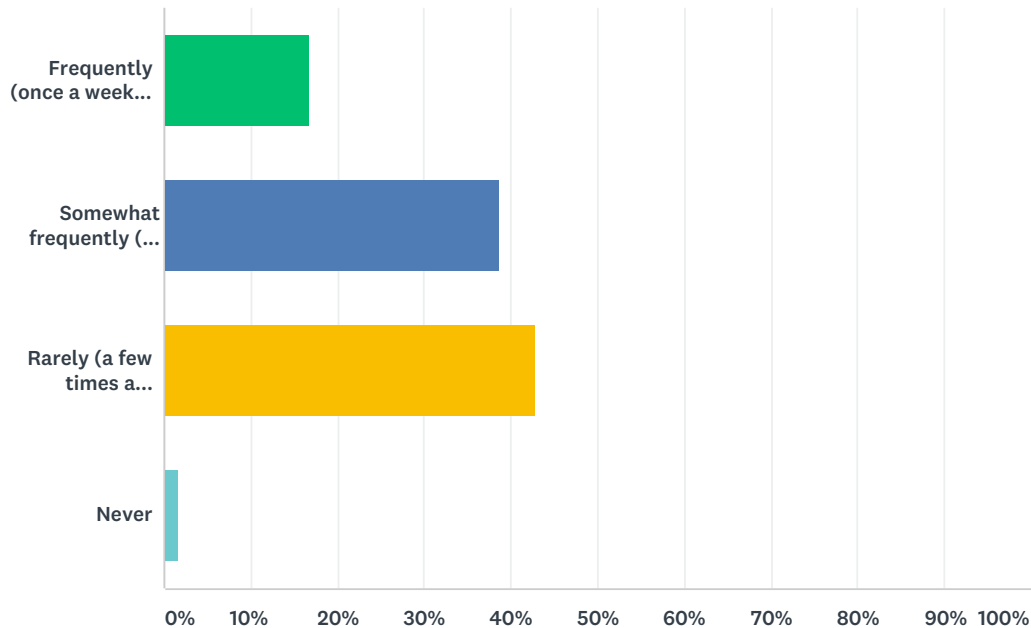


ANSWER CHOICES	RESPONSES	
Yes	75.71%	399

No	24.29%	128
TOTAL		527

## Q8 How often do you access the OLLI website?

Answered: 527 Skipped: 0

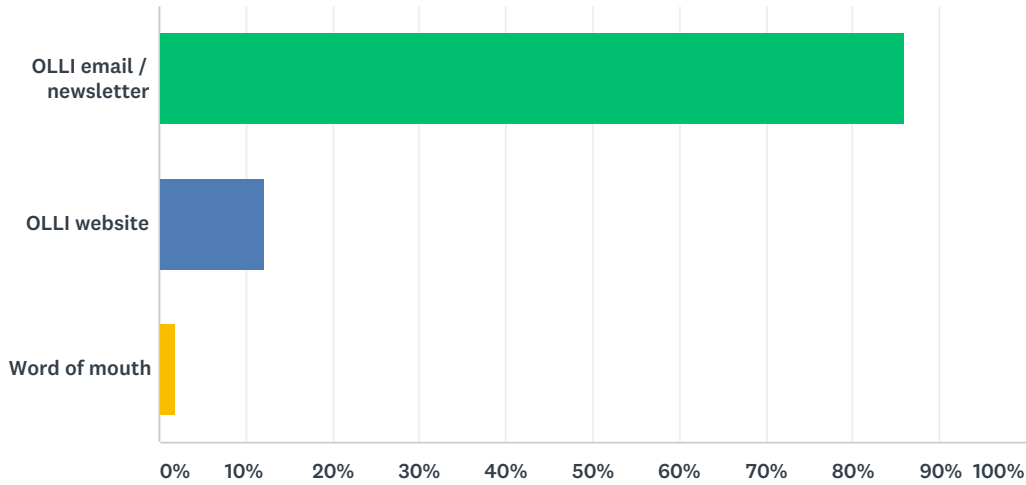


ANSWER CHOICES	RESPONSES	
Frequently (once a week or more)	16.70%	88
Somewhat frequently (a few times a month)	38.71%	204
Rarely (a few times a semester)	42.88%	226
Never	1.71%	9
TOTAL		527

## Q9 To learn about OLLI events, do you usually rely on (check one):

Answered: 527 Skipped: 0

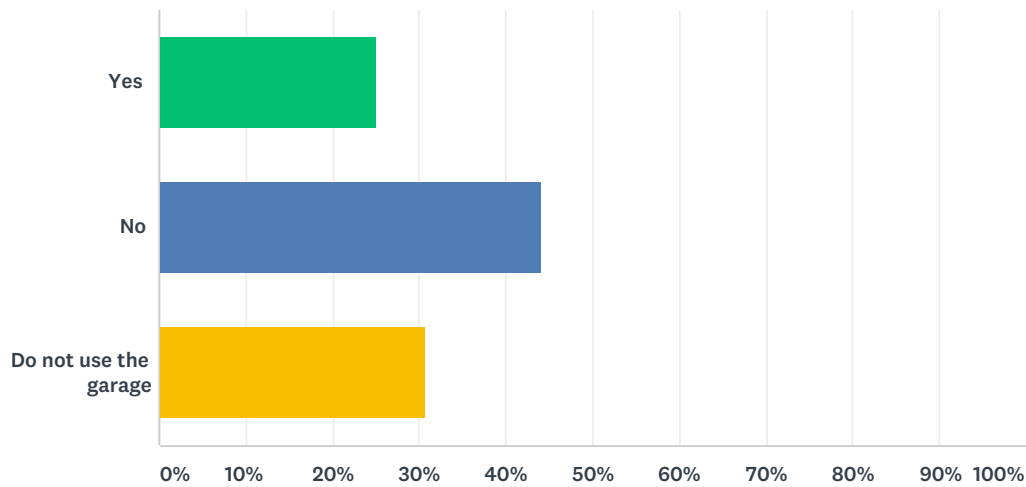
### Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
OLLI email / newsletter	85.96%	453
OLLI website	12.14%	64
Word of mouth	1.90%	10
TOTAL		527

### Q10 Do you use the Pay By Phone parking app to park in the building garage?

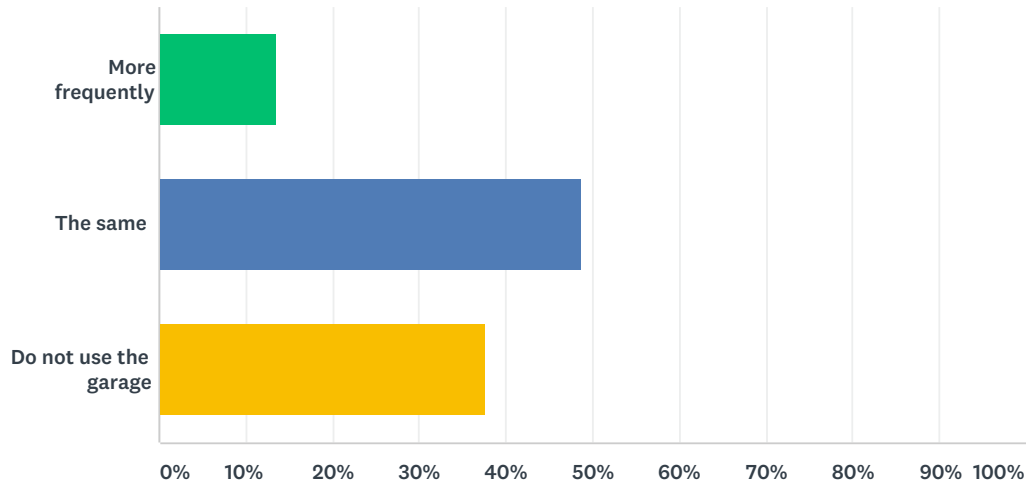
Answered: 527 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	25.05%	132
No	44.21%	233
Do not use the garage	30.74%	162
TOTAL		527

## Q11 If there were a weekly or monthly prepaid parking permit available, would you use the garage:

Answered: 527 Skipped: 0

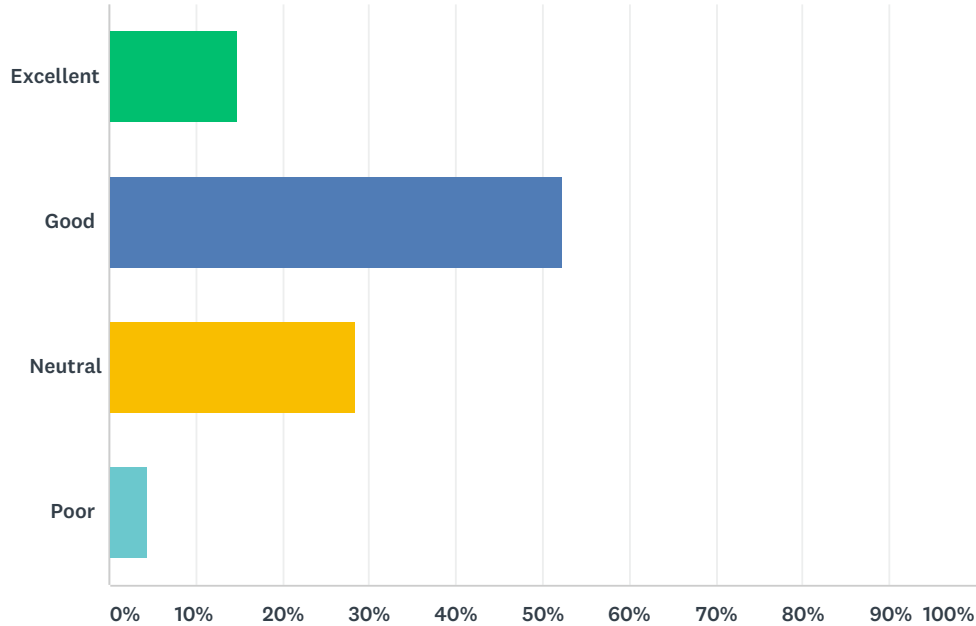


ANSWER CHOICES	RESPONSES	
More frequently	13.66%	72
The same	48.77%	257
Do not use the garage	37.57%	198
TOTAL		527

## Q12 How would you rate the ability of OLLI Study Group Leaders to integrate into their courses the technology available in their classrooms?

Answered: 527 Skipped: 0

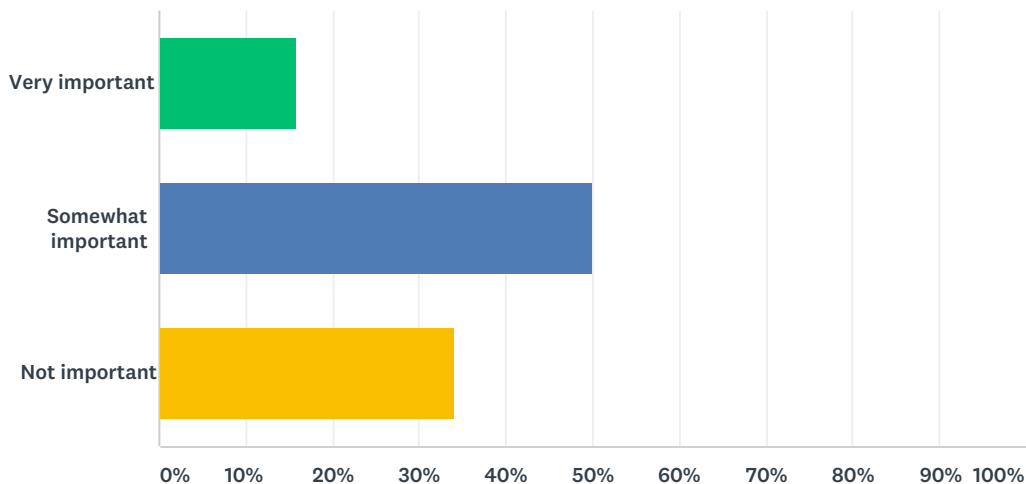
### Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
Excellent	14.80%	78
Good	52.37%	276
Neutral	28.46%	150
Poor	4.36%	23
TOTAL		527

### Q13 How important to you are opportunities to socialize at OLLI?

Answered: 526 Skipped: 1

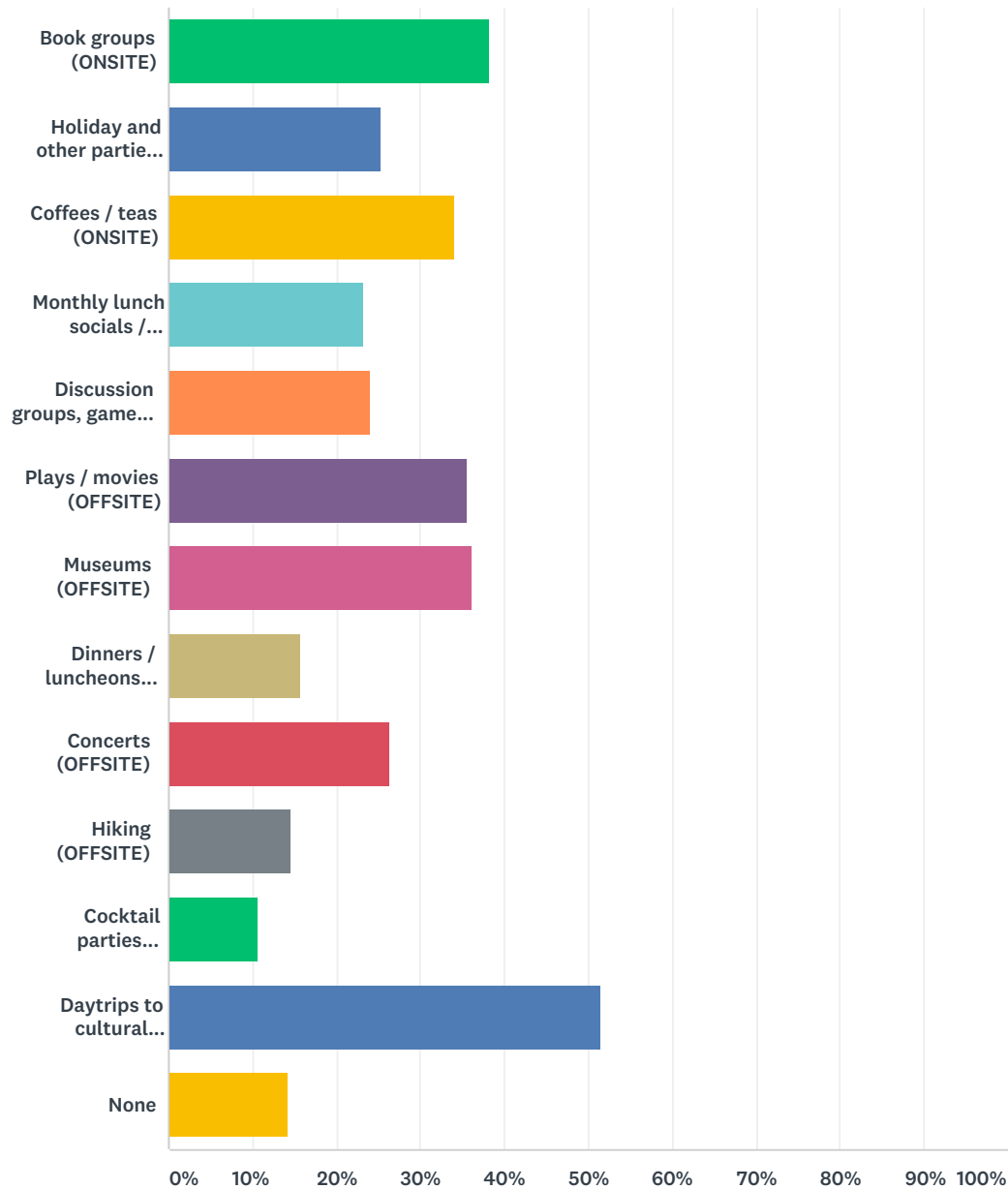


ANSWER CHOICES	RESPONSES	
Very important	15.97%	84
Somewhat important	50.00%	263

Not important	34.03%	179
TOTAL		526

## Q14 Which of the following are you likely to attend (Check all that apply)?

Answered: 521 Skipped: 6



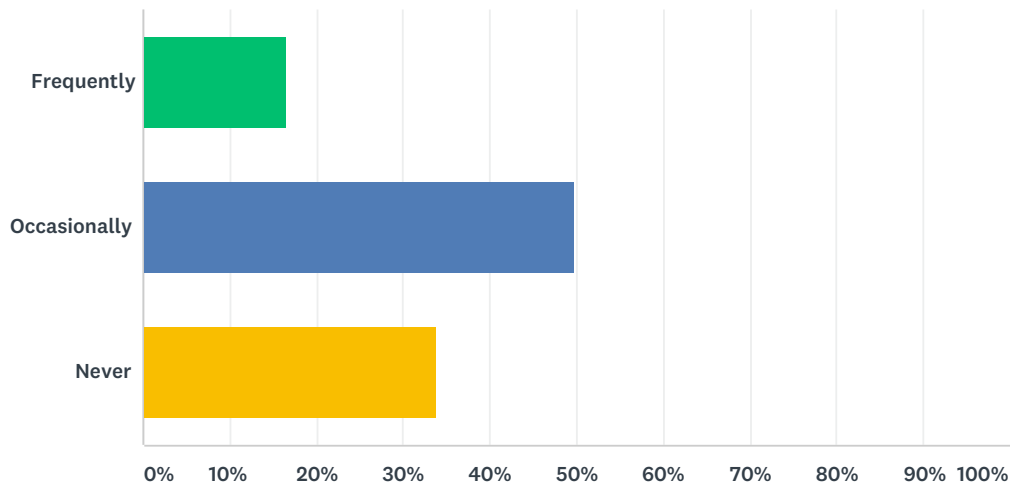
ANSWER CHOICES	RESPONSES	
Book groups (ONSITE)	38.20%	199
Holiday and other parties (ONSITE)	25.34%	132
Coffees / teas (ONSITE)	34.17%	178
Monthly lunch socials / mixers (ONSITE)	23.22%	121

## Copy of Strategic Planning Member and Study Group Leader Survey

Discussion groups, games / bridge (ONSITE)	23.99%	125
Plays / movies (OFFSITE)	35.51%	185
Museums (OFFSITE)	36.28%	189
Dinners / luncheons (OFFSITE)	15.74%	82
Concerts (OFFSITE)	26.30%	137
Hiking (OFFSITE)	14.59%	76
Cocktail parties (OFFSITE)	10.75%	56
Daytrips to cultural destinations (OFFSITE)	51.44%	268
None	14.20%	74
Total Respondents: 521		

### Q15 Do you use the 5th floor Social Space?

Answered: 523 Skipped: 4



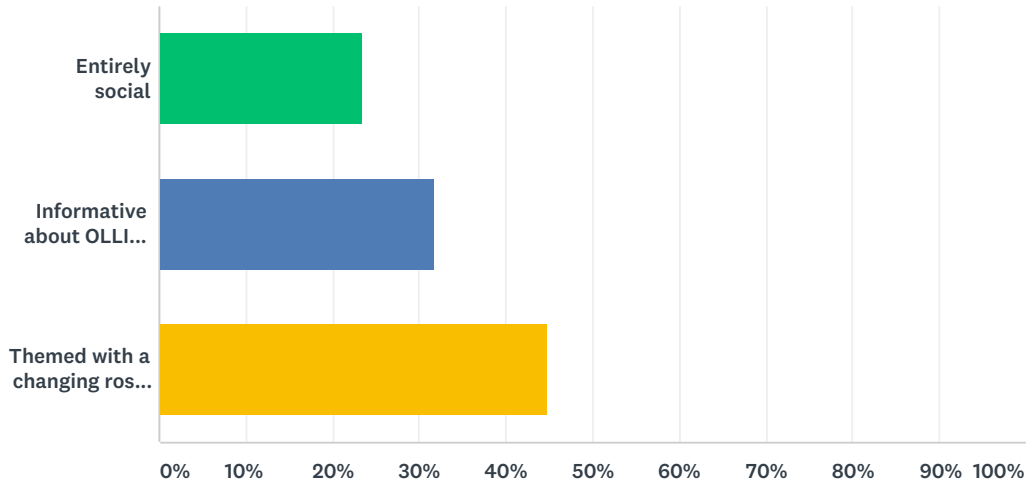
ANSWER CHOICES	RESPONSES	
Frequently	16.44%	86
Occasionally	49.71%	260
Never	33.84%	177
TOTAL		523

Q16 During the fall and spring, Coffee and Conversation breaks are held weekly in the 5th floor Social Space to help members connect with one another. Would you be more likely to attend if these events were:

Answered: 418 Skipped: 109



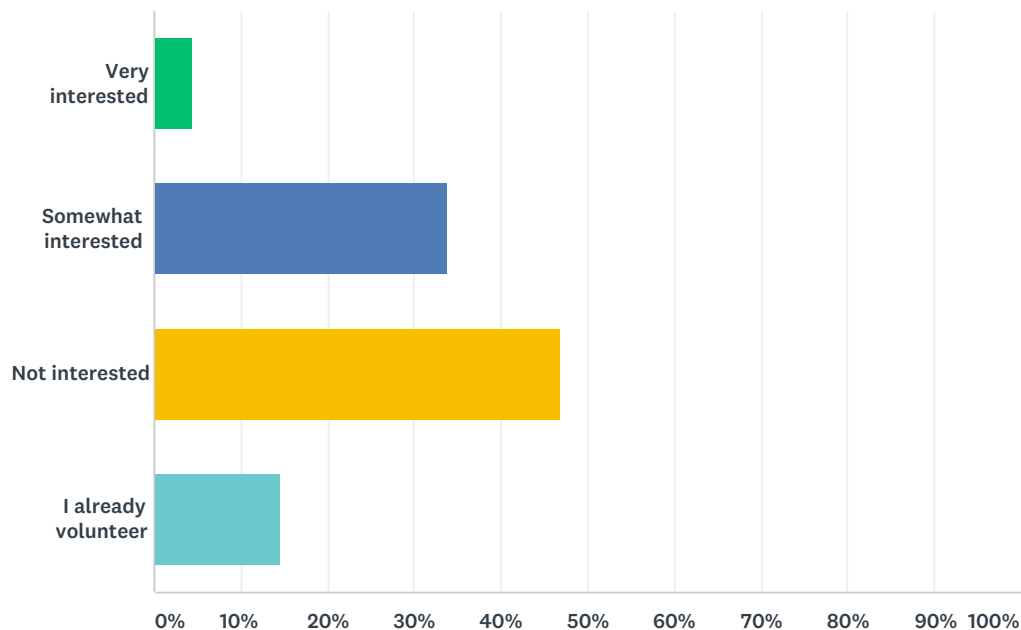
### Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
Entirely social	23.44%	98
Informative about OLLI programs and activities	31.82%	133
Themed with a changing roster of discussion topics	44.74%	187
TOTAL		418

### Q17 How interested are you in volunteering at OLLI?

Answered: 516 Skipped: 11

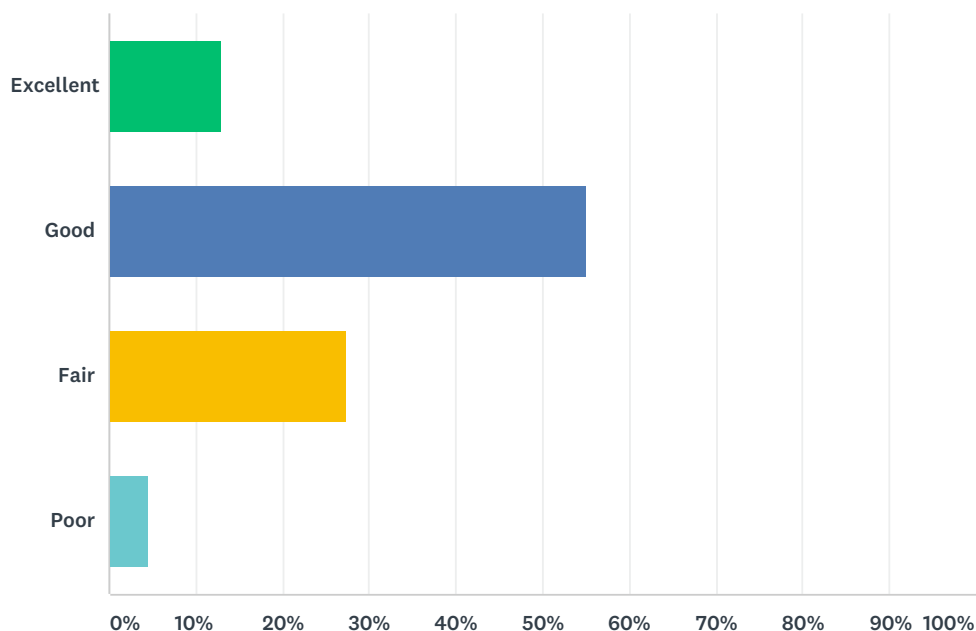


ANSWER CHOICES	RESPONSES	
Very interested	4.46%	23
Somewhat interested	33.91%	175
Not interested	46.90%	242

I already volunteer	14.73%	76
<b>TOTAL</b>		<b>516</b>

## Q18 How would you rate OLLI's outreach to members to encourage volunteerism?

Answered: 507 Skipped: 20

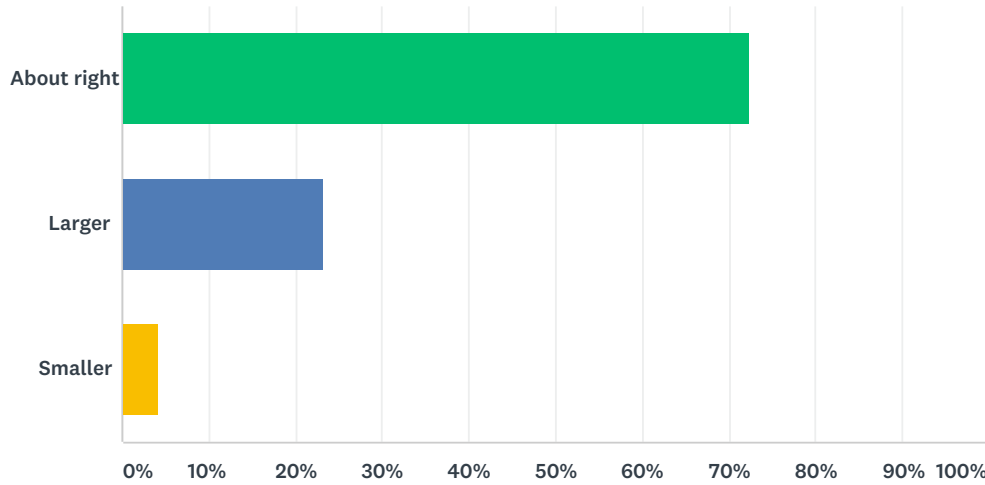


ANSWER CHOICES	RESPONSES	
Excellent	13.02%	66
Good	55.03%	279
Fair	27.42%	139
Poor	4.54%	23
<b>TOTAL</b>		<b>507</b>

## Q19 Do you think the current number of members and academic offerings is about right or would you like to see OLLI at AU be a larger or smaller organization in the future?

Answered: 515 Skipped: 12

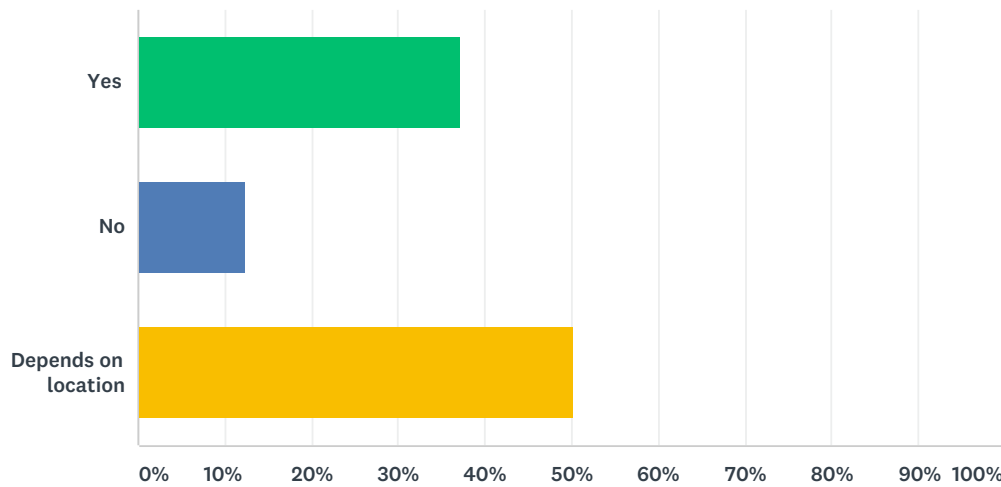
### Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
About right	72.43%	373
Larger	23.30%	120
Smaller	4.27%	22
TOTAL		515

### Q20 If OLLI membership and programs were expanded, would you be willing to travel to satellite locations in Northwest DC?

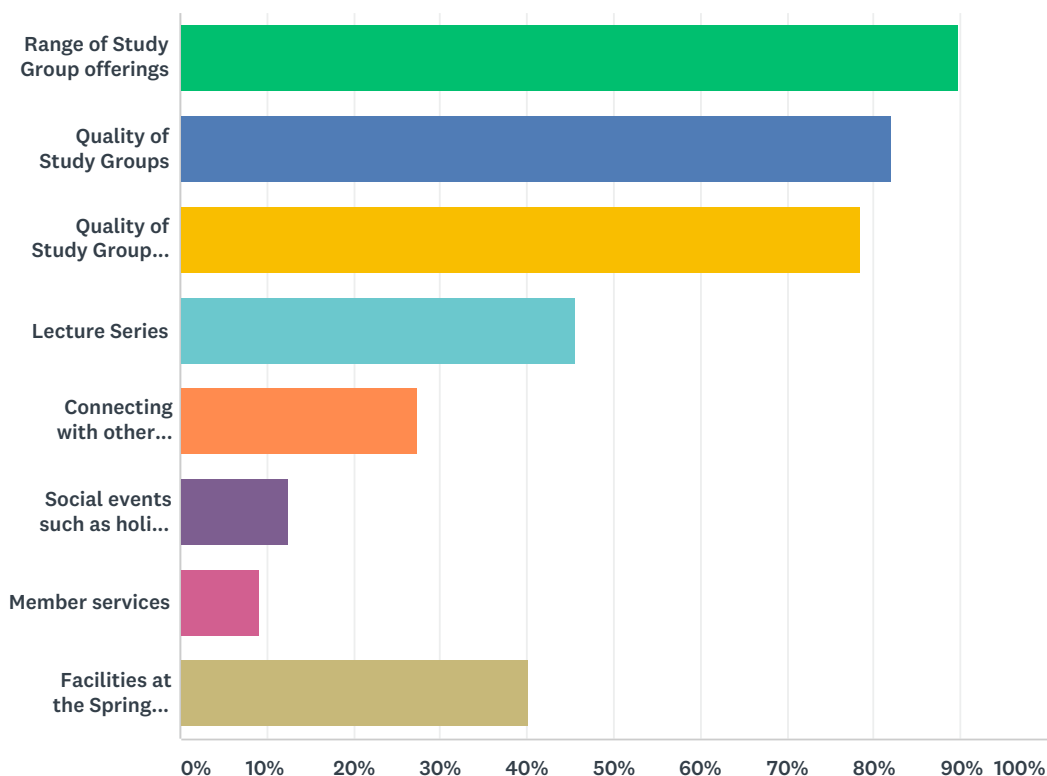
Answered: 525 Skipped: 2



ANSWER CHOICES	RESPONSES	
Yes	37.33%	196
No	12.38%	65
Depends on location	50.29%	264
TOTAL		525

## Q21 What do you consider to be the strengths of OLLI at AU - (Check all that apply):

Answered: 525 Skipped: 2

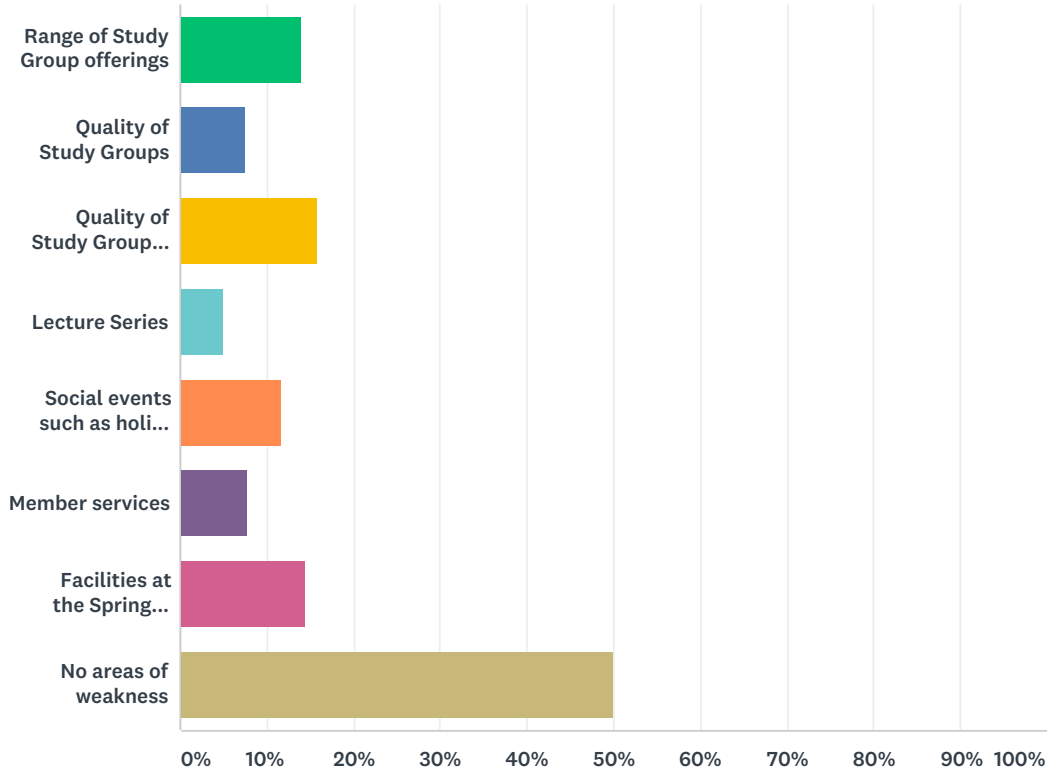


ANSWER CHOICES	RESPONSES	
Range of Study Group offerings	89.71%	471
Quality of Study Groups	82.10%	431
Quality of Study Group Leaders	78.48%	412
Lecture Series	45.52%	239
Connecting with other members	27.43%	144
Social events such as holiday party, trips, weekly coffee & conversation, etc.	12.57%	66
Member services	9.14%	48
Facilities at the Spring Valley Building	40.19%	211
Total Respondents: 525		

## Q22 What do you consider to be weaknesses or areas to be improved upon (Check all that apply):

Answered: 482 Skipped: 45

## Copy of Strategic Planning Member and Study Group Leader Survey

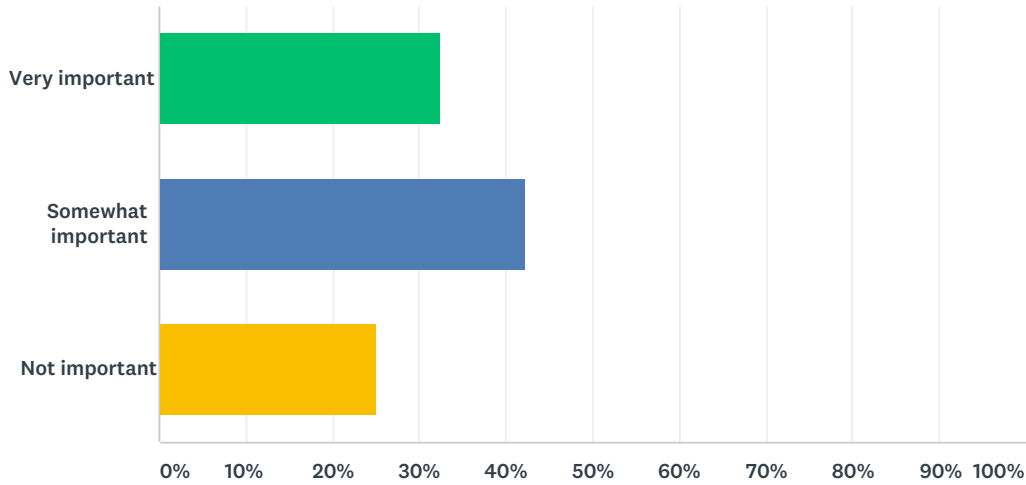


ANSWER CHOICES	RESPONSES	
Range of Study Group offerings	14.11%	68
Quality of Study Groups	7.47%	36
Quality of Study Group Leaders	15.98%	77
Lecture Series	4.98%	24
Social events such as holiday party, trips, weekly coffee & conversation, etc.	11.62%	56
Member services	7.68%	37
Facilities at the Spring Valley Building	14.52%	70
No areas of weakness	50.00%	241
Total Respondents: 482		

**Q23 How important is diversity (e.g. age, racial/ethnic, disability, socioeconomic, etc.) within our membership to you?**

Answered: 520 Skipped: 7

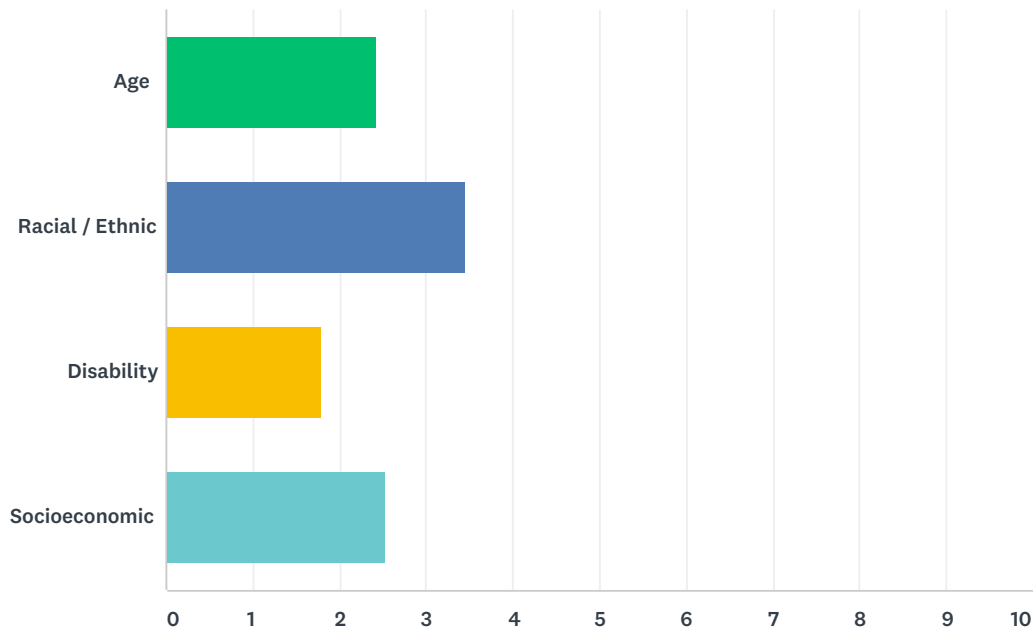
### Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
Very important	32.50%	169
Somewhat important	42.31%	220
Not important	25.19%	131
TOTAL		520

**Q24 If you think increasing diversity is important, which dimensions do you think are most critical? Please rank order the following (Item at top being most critical, while item at bottom is least critical):**

Answered: 385 Skipped: 142



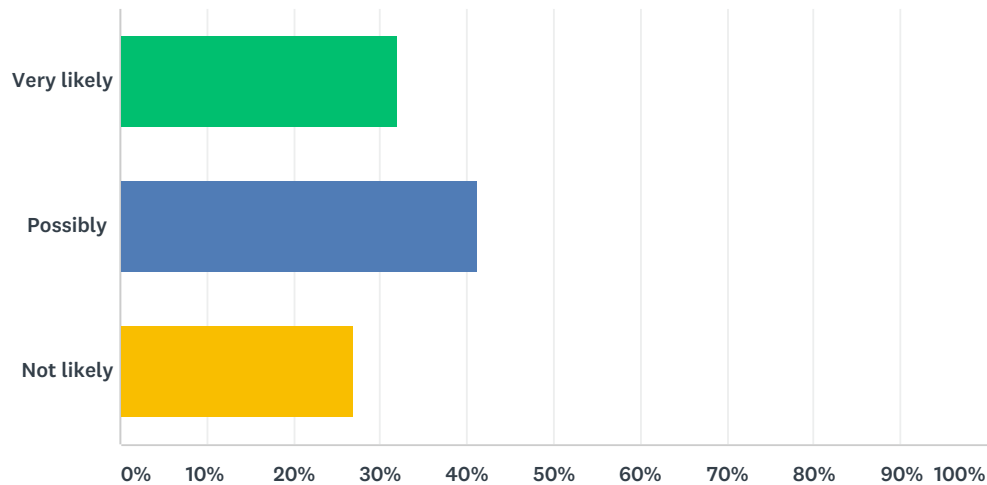
	1	2	3	4	TOTAL	SCORE
Age	28.40% 92	19.14% 62	18.83% 61	33.64% 109	324	2.42

# Copy of Strategic Planning Member and Study Group Leader Survey

Racial / Ethnic	60.33% 219	27.55% 100	9.64% 35	2.48% 9	363	3.46
Disability	2.89% 9	15.11% 47	40.51% 126	41.48% 129	311	1.79
Socioeconomic	14.85% 49	40.91% 135	26.67% 88	17.58% 58	330	2.53

**Q25 To foster greater diversity, how likely would you be to attend classes that address policy and culture issues relating to racial and ethnic diversity?**

Answered: 513 Skipped: 14

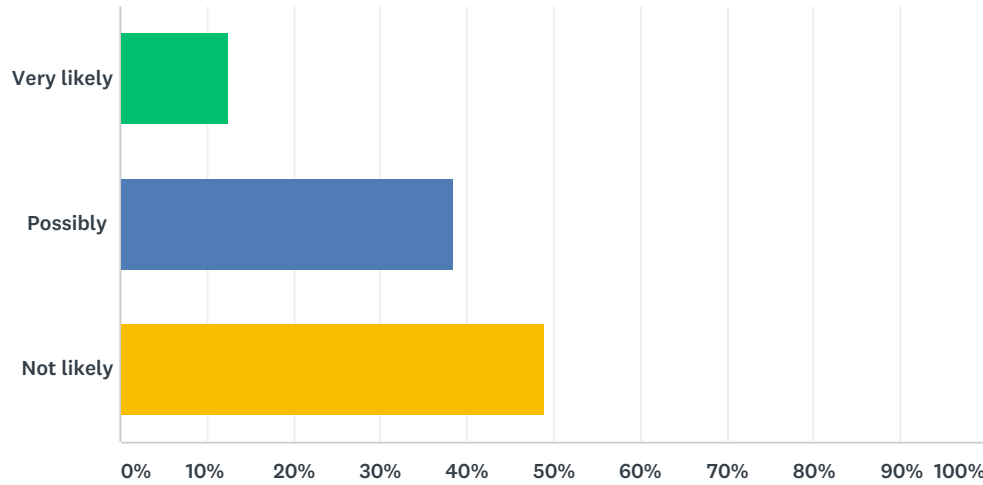


ANSWER CHOICES	RESPONSES
Very likely	31.97% 164
Possibly	41.13% 211
Not likely	26.90% 138
TOTAL	513

**Q26 To foster greater diversity, how likely would you be to attend classes at an alternate campus in another part of the city that is more racially and culturally diverse?**

Answered: 517 Skipped: 10

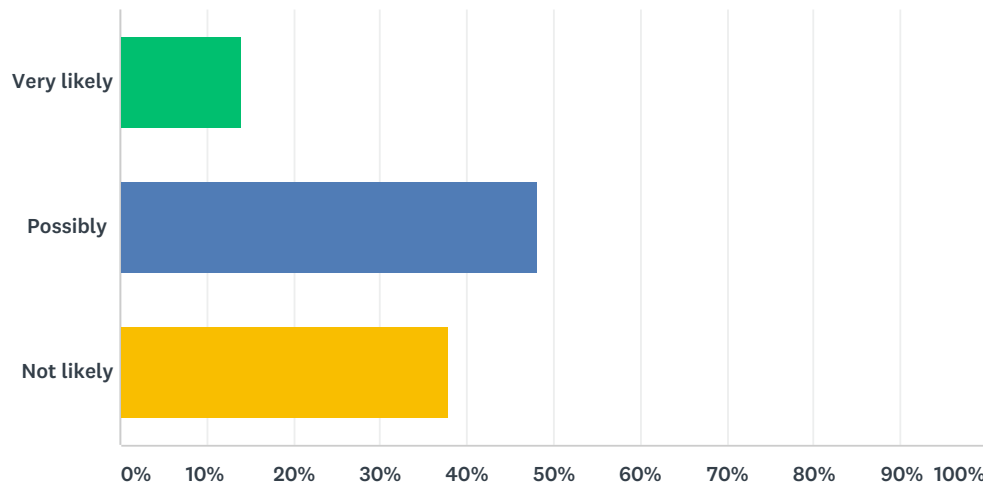
### Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
Very likely	12.57%	65
Possibly	38.49%	199
Not likely	48.94%	253
TOTAL		517

**Q27 To foster greater diversity, how likely would you be to attend OLLI occasional events in other parts of the city that are more racially and culturally diverse?**

Answered: 518 Skipped: 9

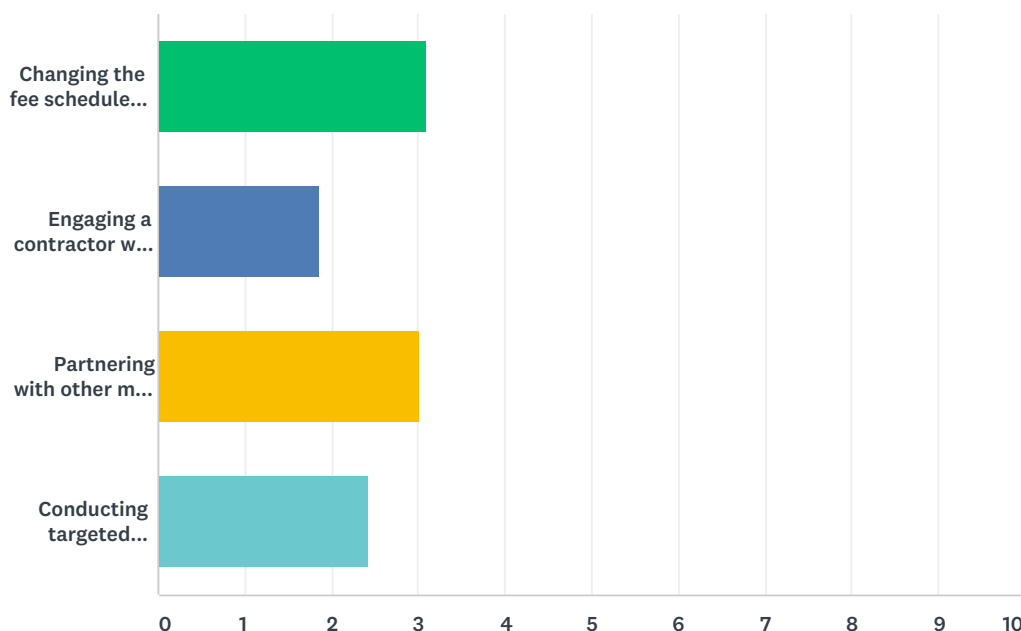


ANSWER CHOICES	RESPONSES	
Very likely	14.09%	73
Possibly	48.07%	249
Not likely	37.84%	196
TOTAL		518



**Q28 Which of the following initiatives are likely to be helpful in increasing diversity? Rank as 1 (most helpful), 2 (somewhat helpful), 3 (probably not helpful), 4 (not helpful)**

Answered: 454 Skipped: 73

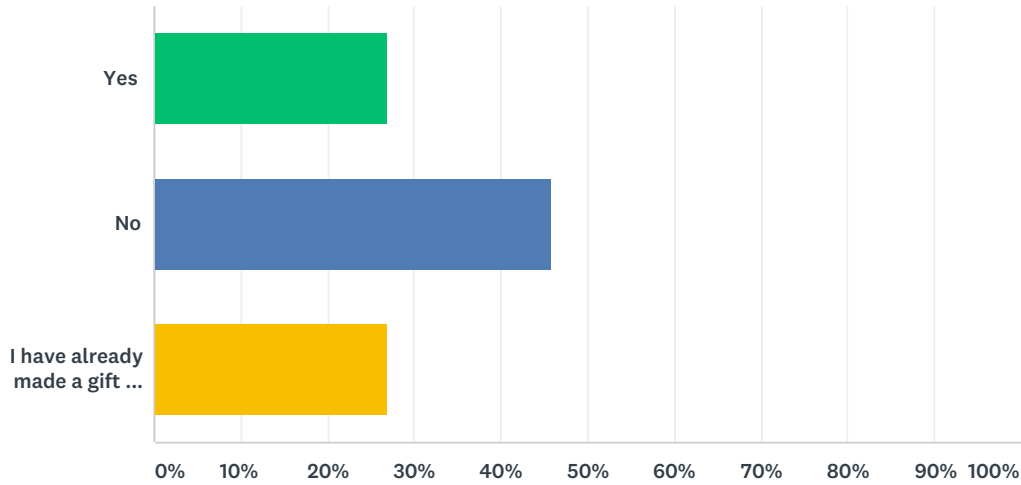


	1	2	3	4	TOTAL	SCORE
Changing the fee schedule to allow new participants to take one course for a reduced fee	49.48% 190	22.14% 85	16.67% 64	11.72% 45	384	3.09
Engaging a contractor with experience in increasing diversity at educational institutions	9.51% 33	18.44% 64	20.17% 70	51.87% 180	347	1.86
Partnering with other more diverse organizations	34.63% 134	36.95% 143	23.00% 89	5.43% 21	387	3.01
Conducting targeted outreach	20.30% 80	25.38% 100	31.47% 124	22.84% 90	394	2.43

**Q29 If you have not yet made a gift to OLLI's Campaign 2020 are you considering doing so?**

Answered: 514 Skipped: 13

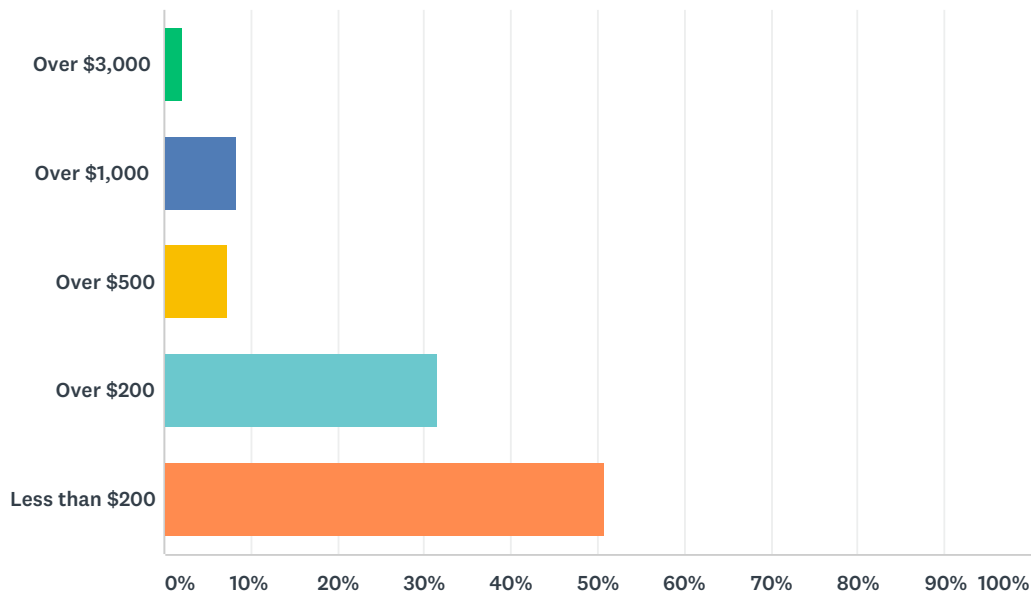
### Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
Yes	27.04%	139
No	45.91%	236
I have already made a gift to Campaign 2020	27.04%	139
TOTAL		514

### Q30 If considering making a gift over a three-year time frame, which level of donation are you considering?

Answered: 301 Skipped: 226



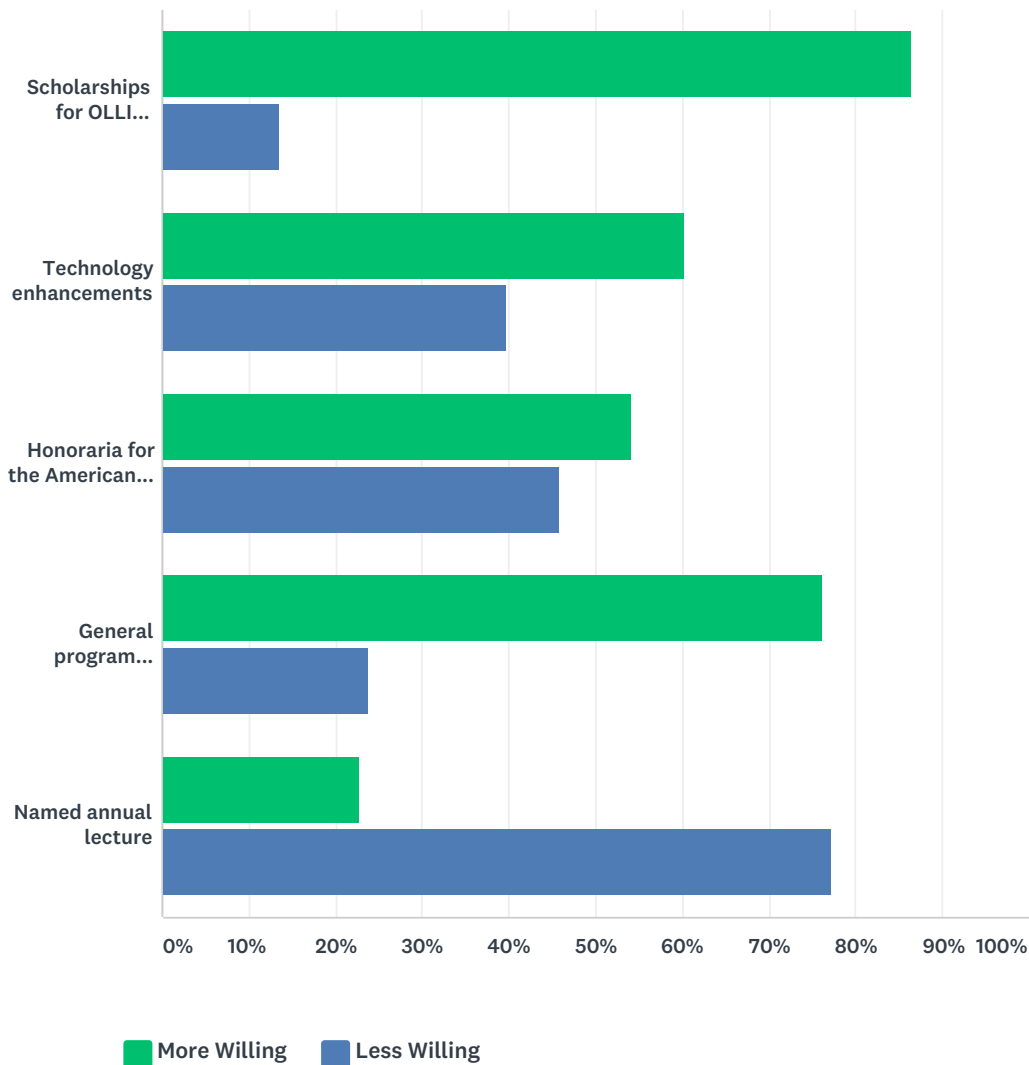
ANSWER CHOICES	RESPONSES	
Over \$3,000	1.99%	6
Over \$1,000	8.31%	25
Over \$500	7.31%	22

# Copy of Strategic Planning Member and Study Group Leader Survey

Over \$200	31.56%	95
Less than \$200	50.83%	153
<b>TOTAL</b>		<b>301</b>

**Q31 If considering making a gift, which of the following purposes would make you more willing or less willing to make a financial contribution?**

Answered: 370 Skipped: 157



	<b>MORE WILLING</b>	<b>LESS WILLING</b>	<b>TOTAL</b>
Scholarships for OLLI members in need	86.50% 269	13.50% 42	311
Technology enhancements	60.24% 150	39.76% 99	249
Honoraria for the American University schools and departments and the Washington think tanks that provide classes at OLLI	54.24% 147	45.76% 124	271
General program operations support	76.12% 220	23.88% 69	289

Named annual lecture

22.91%

52

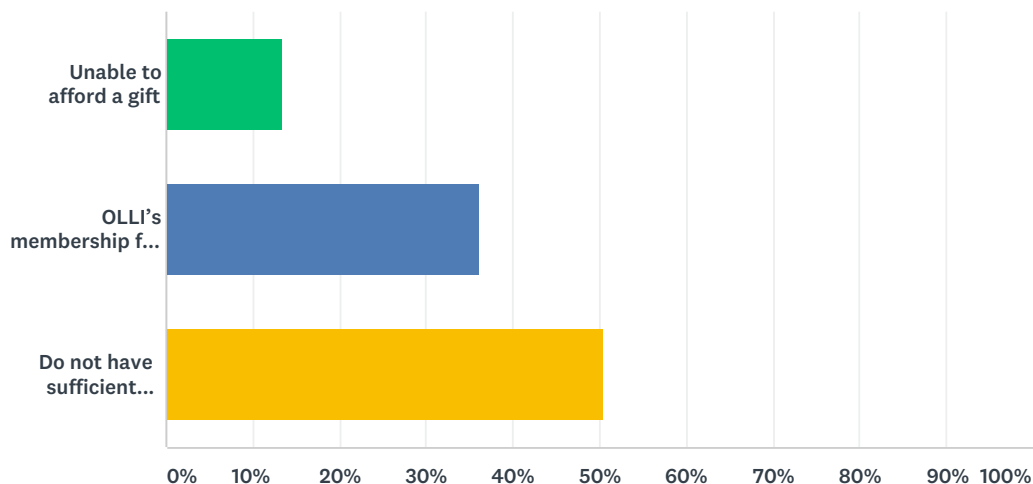
77.09%

175

227

### Q32 If not considering making a gift, select one of the reasons below

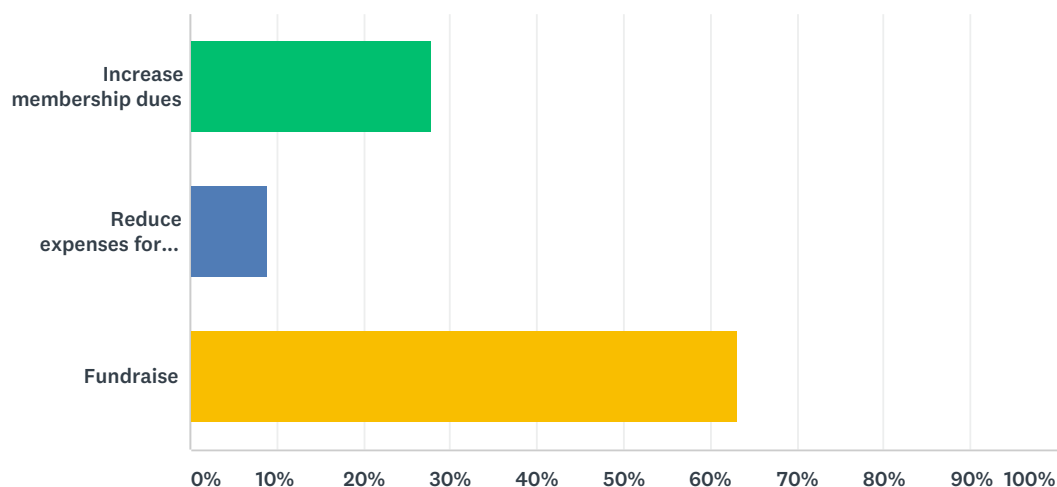
Answered: 290 Skipped: 237



ANSWER CHOICES	RESPONSES	
Unable to afford a gift	13.45%	39
OLLI's membership fees should cover entire cost of its programs	36.21%	105
Do not have sufficient knowledge of OLLI's financial needs	50.34%	146
TOTAL		290

### Q33 If OLLI needs additional financial resources, which of the following ways would you prefer?

Answered: 479 Skipped: 48



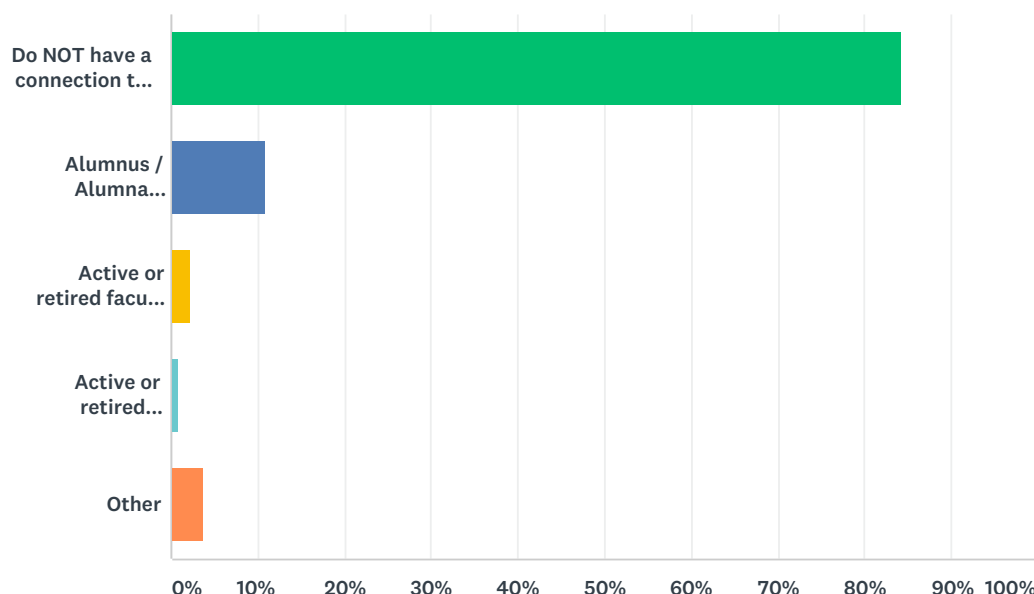
ANSWER CHOICES	RESPONSES
----------------	-----------

## Copy of Strategic Planning Member and Study Group Leader Survey

Increase membership dues	27.77%	133
Reduce expenses for staff, classroom space, etc., even if that will result in a reduction of programming	8.98%	43
Fundraise	63.26%	303
<b>TOTAL</b>		<b>479</b>

### Q34 Do you have a connection with American University? If so, what is it? (Check all that apply)

Answered: 444 Skipped: 83

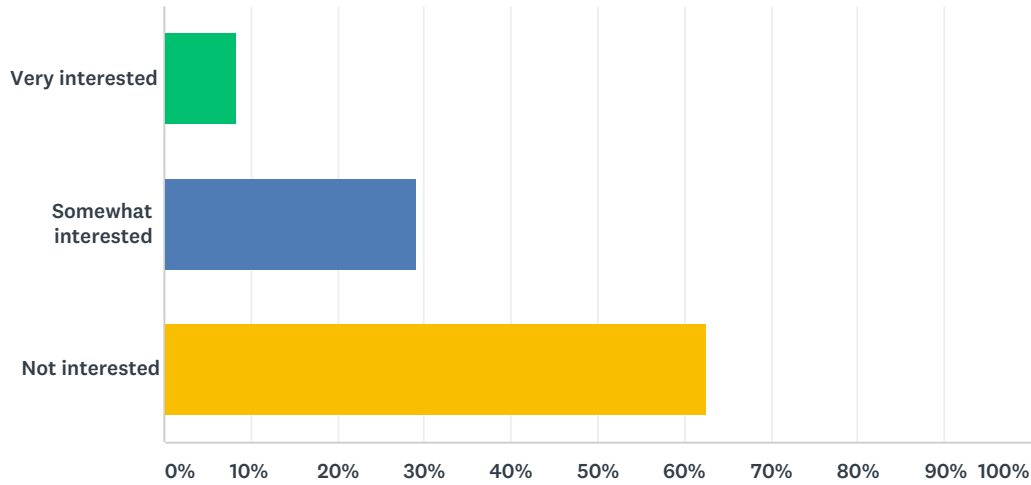


ANSWER CHOICES	RESPONSES	
Do NOT have a connection to AU	84.23%	374
Alumnus / Alumna (undergraduate or graduate)	10.81%	48
Active or retired faculty member	2.25%	10
Active or retired employee	0.90%	4
Other	3.83%	17
Total Respondents: 444		

### Q35 How interested would you be in participating in a program that matched AU undergraduate and graduate students with OLLI member mentors who could offer professional/career guidance?

Answered: 514 Skipped: 13

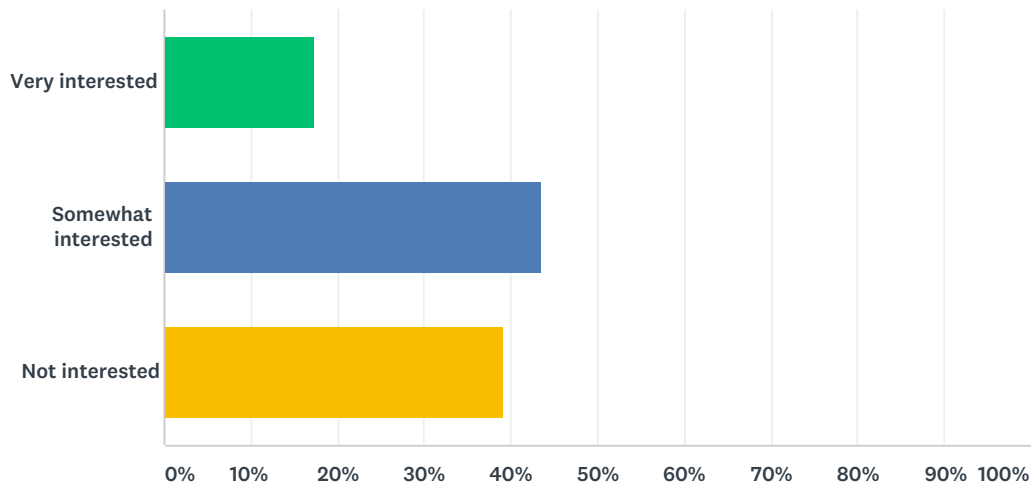
### Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
Very interested	8.37%	43
Somewhat interested	29.18%	150
Not interested	62.45%	321
TOTAL		514

**Q36 How interested would you be in participating in a program that regularly brought together OLLI members and international AU undergraduate students for conversation and cultural exchange?**

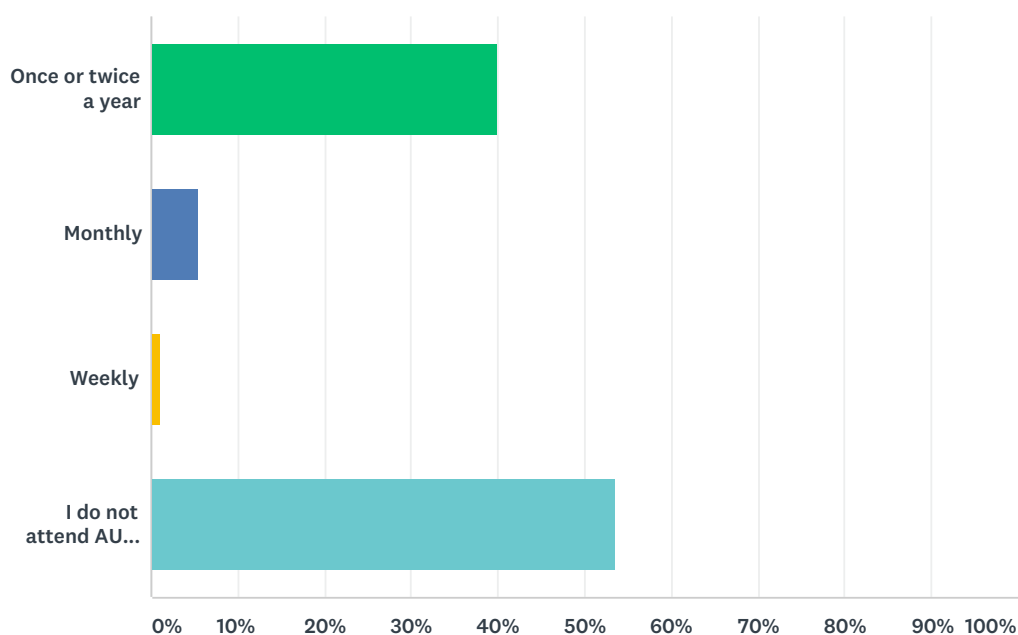
Answered: 515 Skipped: 12



ANSWER CHOICES	RESPONSES	
Very interested	17.28%	89
Somewhat interested	43.50%	224
Not interested	39.22%	202
TOTAL		515

### Q37 Generally, how often do you attend non-OLLI American University events such as lectures, films, concerts, etc?

Answered: 517 Skipped: 10

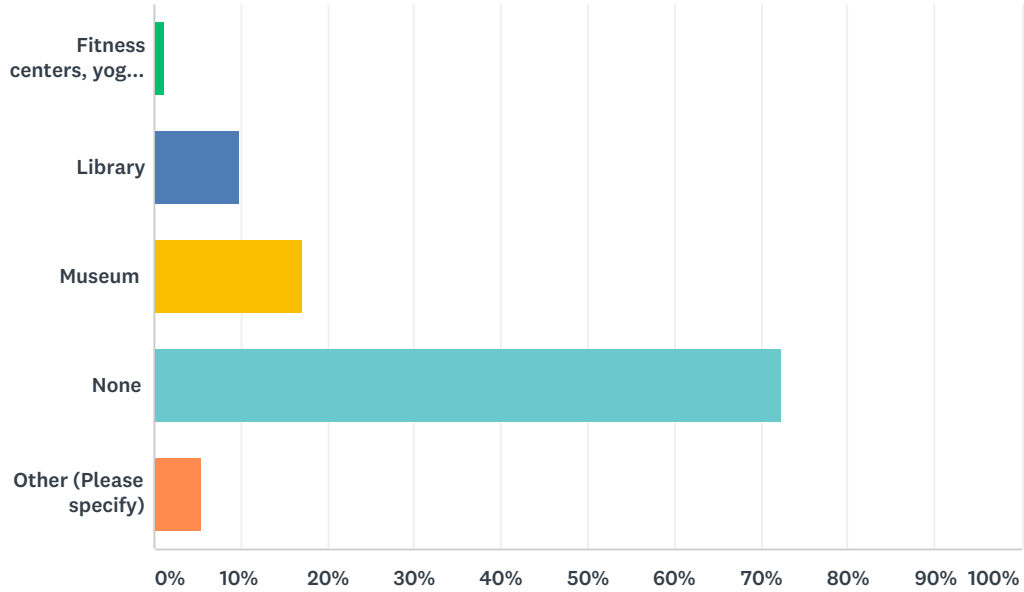


ANSWER CHOICES	RESPONSES	
Once or twice a year	40.04%	207
Monthly	5.42%	28
Weekly	0.97%	5
I do not attend AU events	53.58%	277
TOTAL		517

### Q38 Do you use American University facilities? (Check all that apply)

Answered: 453 Skipped: 74

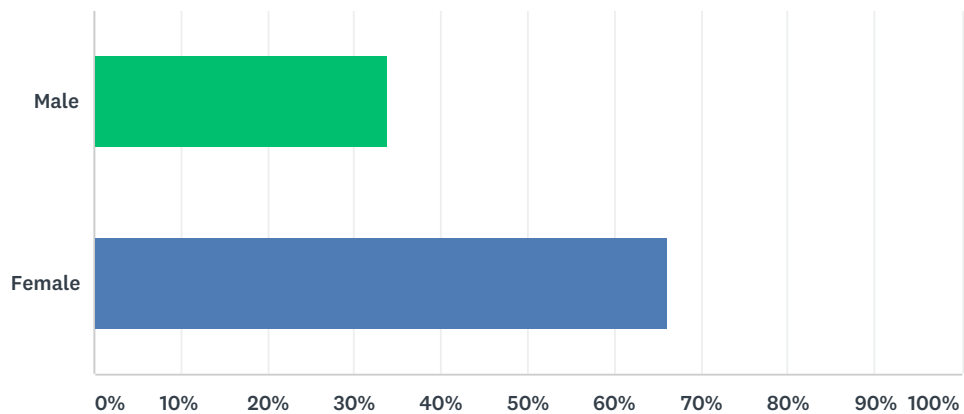
## Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
Fitness centers, yoga classes, etc.	1.32%	6
Library	9.93%	45
Museum	17.22%	78
None	72.41%	328
Other (Please specify)	5.52%	25
Total Respondents: 453		

## Q39 Gender

Answered: 514 Skipped: 13

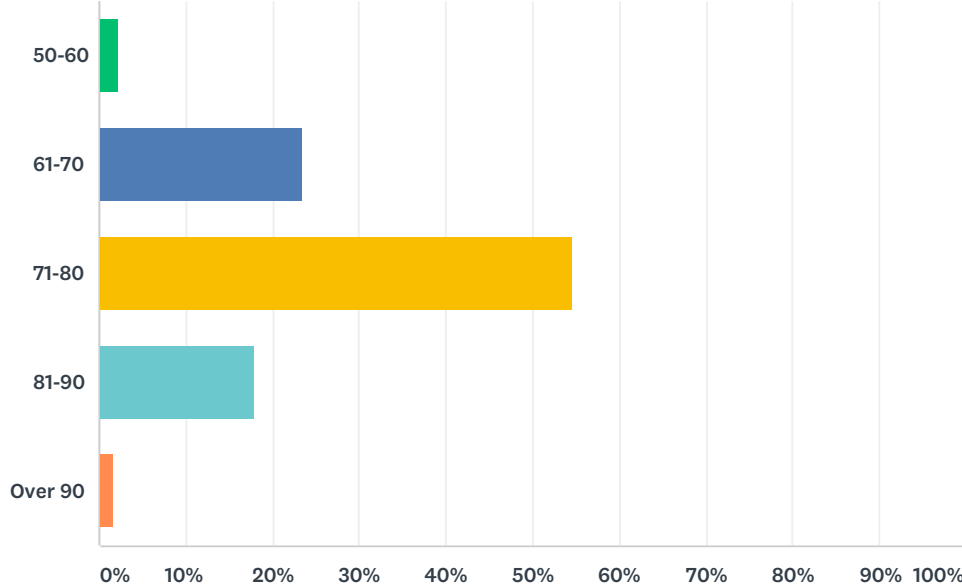


ANSWER CHOICES	RESPONSES	
Male	33.85%	174
Female	66.15%	340
TOTAL		514



## Q40 Age

Answered: 518 Skipped: 9

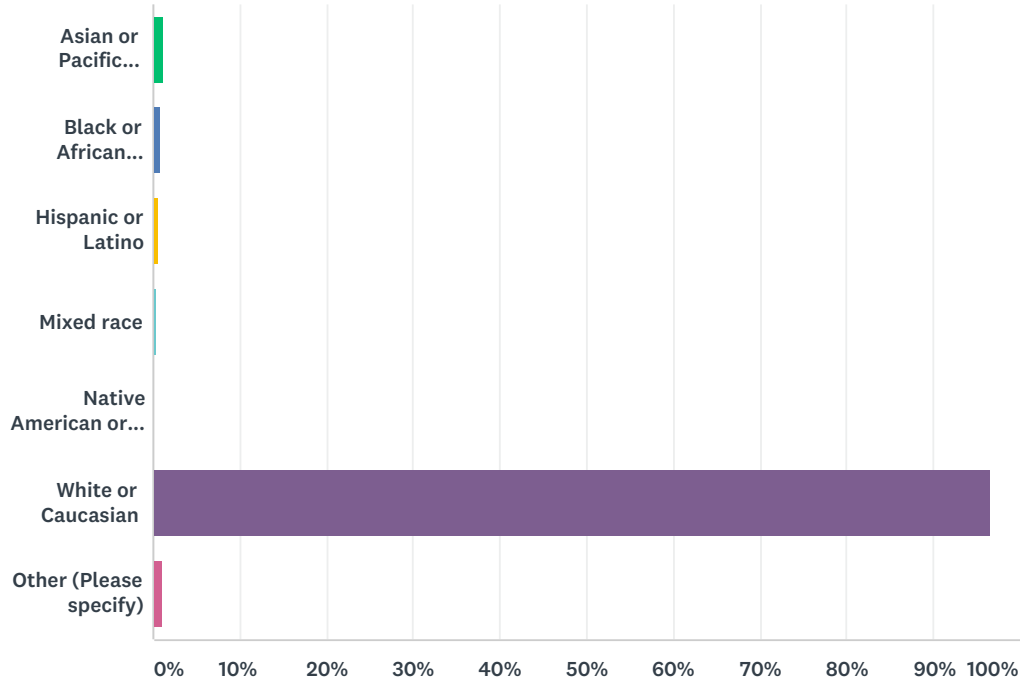


ANSWER CHOICES	RESPONSES	
50-60	2.32%	12
61-70	23.36%	121
71-80	54.63%	283
81-90	17.95%	93
Over 90	1.74%	9
TOTAL		518

## Q41 Race (Check all that apply)

Answered: 461 Skipped: 66

## Copy of Strategic Planning Member and Study Group Leader Survey

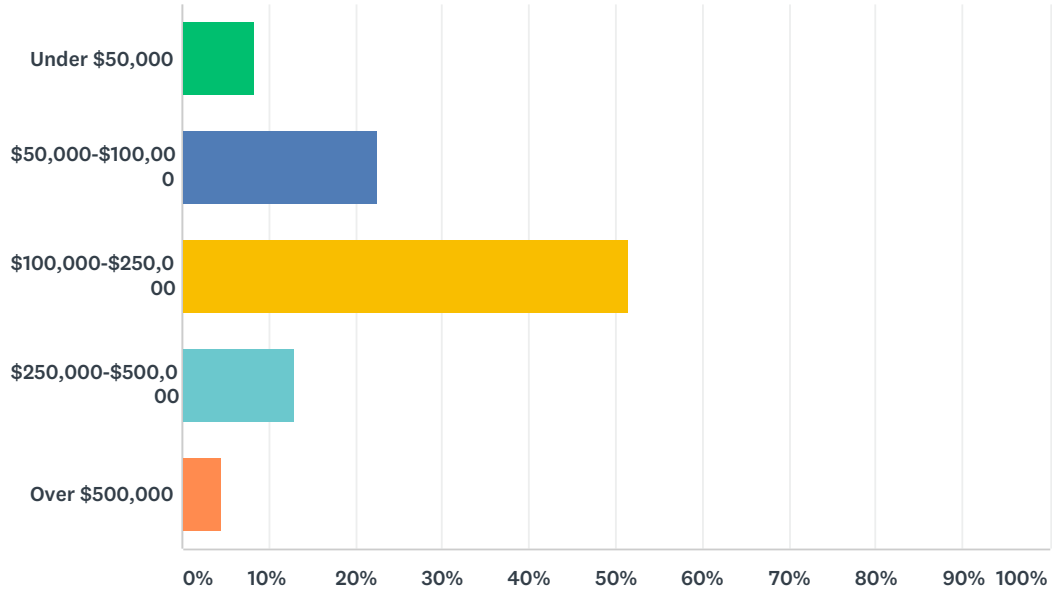


ANSWER CHOICES	RESPONSES	
Asian or Pacific Islander	1.30%	6
Black or African American	0.87%	4
Hispanic or Latino	0.65%	3
Mixed race	0.43%	2
Native American or American Indian	0.00%	0
White or Caucasian	96.75%	446
Other (Please specify)	1.08%	5
Total Respondents: 461		

## Q42 Present income range (OPTIONAL)

Answered: 323   Skipped: 204

### Copy of Strategic Planning Member and Study Group Leader Survey

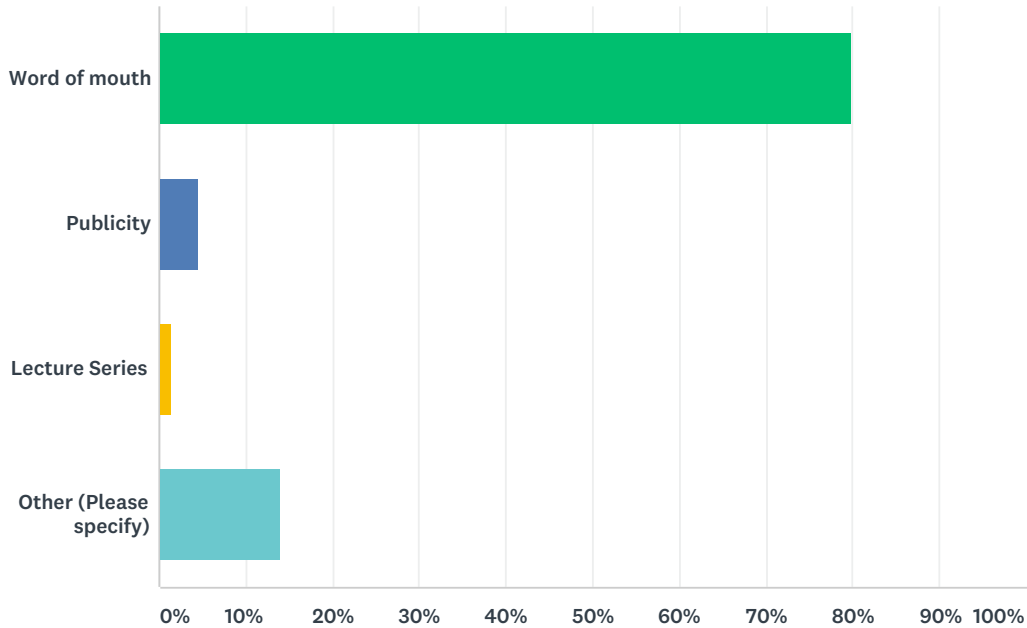


ANSWER CHOICES	RESPONSES	
Under \$50,000	8.36%	27
\$50,000-\$100,000	22.60%	73
\$100,000-\$250,000	51.39%	166
\$250,000-\$500,000	13.00%	42
Over \$500,000	4.64%	15
TOTAL		323

**Q43 If you joined OLLI at AU in fall 2016 or later, how did you learn about OLLI?**

Answered: 214 Skipped: 313

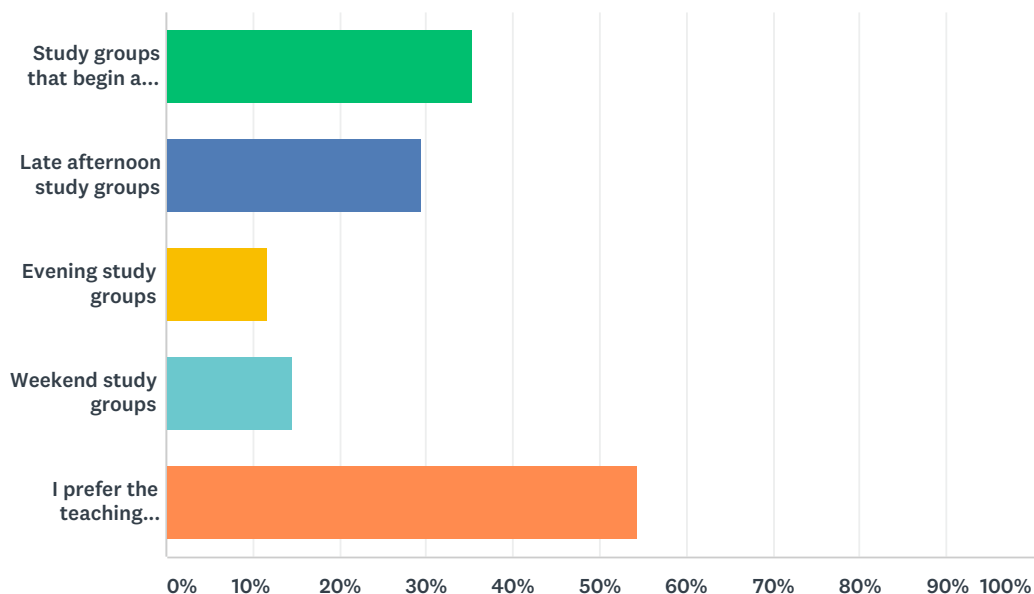
### Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
Word of mouth	79.91%	171
Publicity	4.67%	10
Lecture Series	1.40%	3
Other (Please specify)	14.02%	30
TOTAL		214

### Q44 If the current schedule of classes were modified, how interested would you be in teaching (Check all that apply):

Answered: 68 Skipped: 459

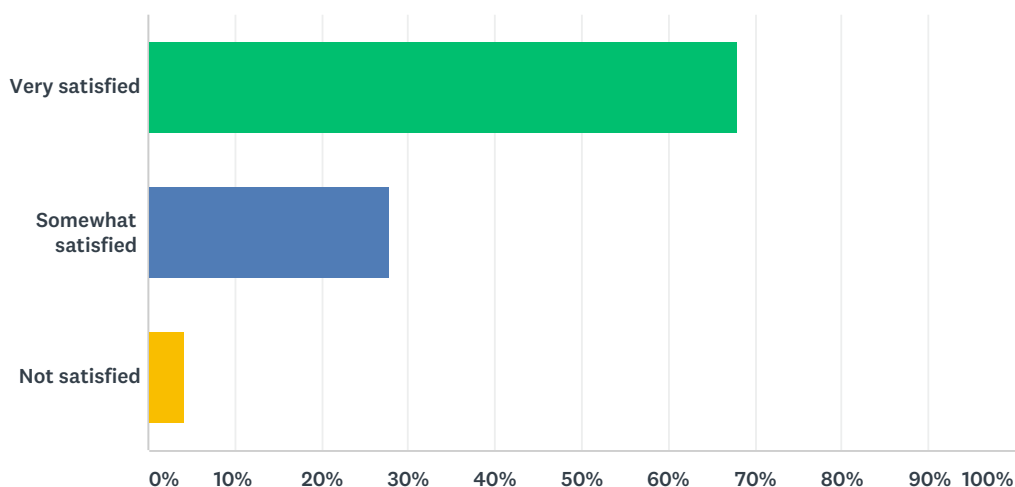


## Copy of Strategic Planning Member and Study Group Leader Survey

ANSWER CHOICES	RESPONSES	
Study groups that begin at 9:15 AM	35.29%	24
Late afternoon study groups	29.41%	20
Evening study groups	11.76%	8
Weekend study groups	14.71%	10
I prefer the teaching schedule as it currently is	54.41%	37
Total Respondents: 68		

### Q45 How satisfied are you with the classroom technology?

Answered: 72    Skipped: 455

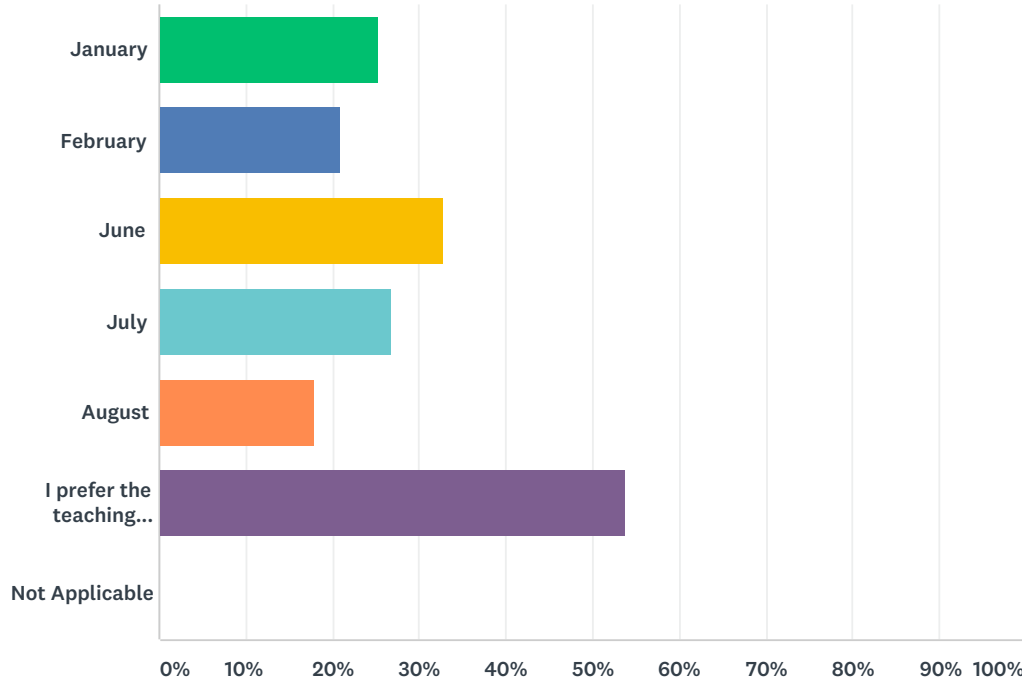


ANSWER CHOICES	RESPONSES	
Very satisfied	68.06%	49
Somewhat satisfied	27.78%	20
Not satisfied	4.17%	3
TOTAL		72

### Q46 If the current schedule of classes were modified, how interested would you be interested in teaching in (Check all that apply):

Answered: 67    Skipped: 460

### Copy of Strategic Planning Member and Study Group Leader Survey

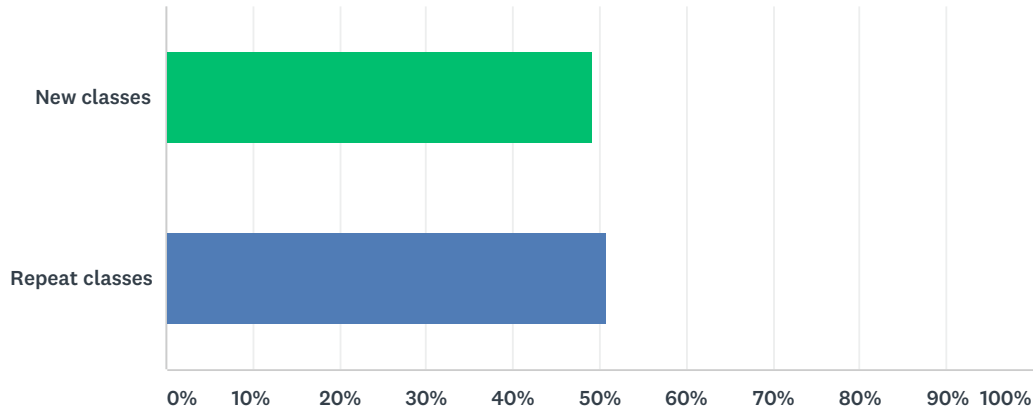


ANSWER CHOICES	RESPONSES	
January	25.37%	17
February	20.90%	14
June	32.84%	22
July	26.87%	18
August	17.91%	12
I prefer the teaching schedule as it currently is	53.73%	36
Not Applicable	0.00%	0
Total Respondents: 67		

**Q47 If you taught additional study groups in an expanded calendar, would you teach new classes or repeat classes that you are already teaching?**

Answered: 57 Skipped: 470

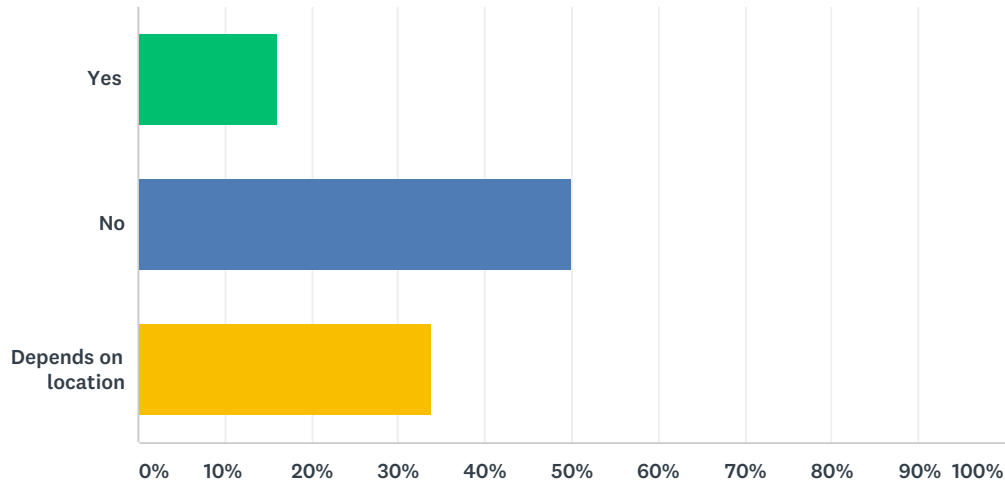
### Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
New classes	49.12%	28
Repeat classes	50.88%	29
TOTAL		57

### Q48 Are you interested in teaching at senior care, community, and residential centers such as IONA House, Grand Oaks, etc.

Answered: 68 Skipped: 459

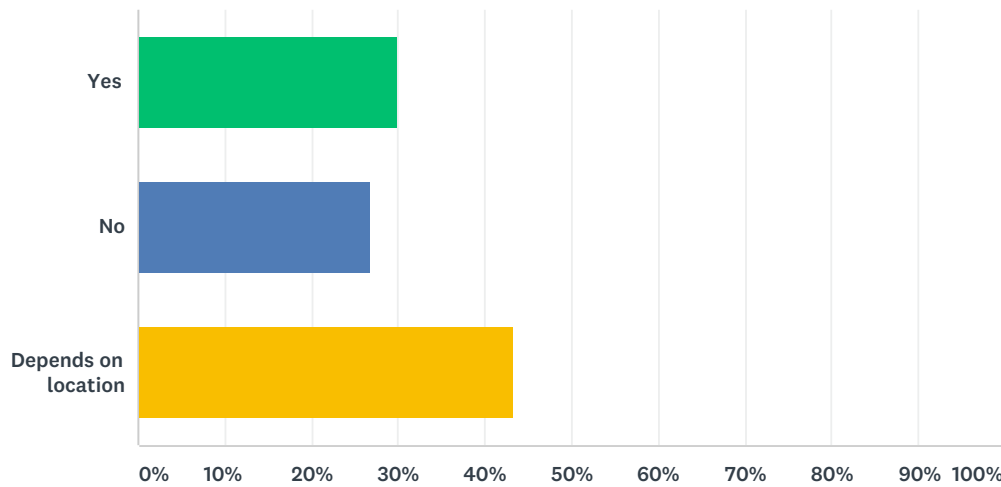


ANSWER CHOICES	RESPONSES	
Yes	16.18%	11
No	50.00%	34
Depends on location	33.82%	23
TOTAL		68

### Q49 To promote diversity, would you be interested in teaching at a facility in a part of the city that is more racially and culturally diverse?

Answered: 67 Skipped: 460

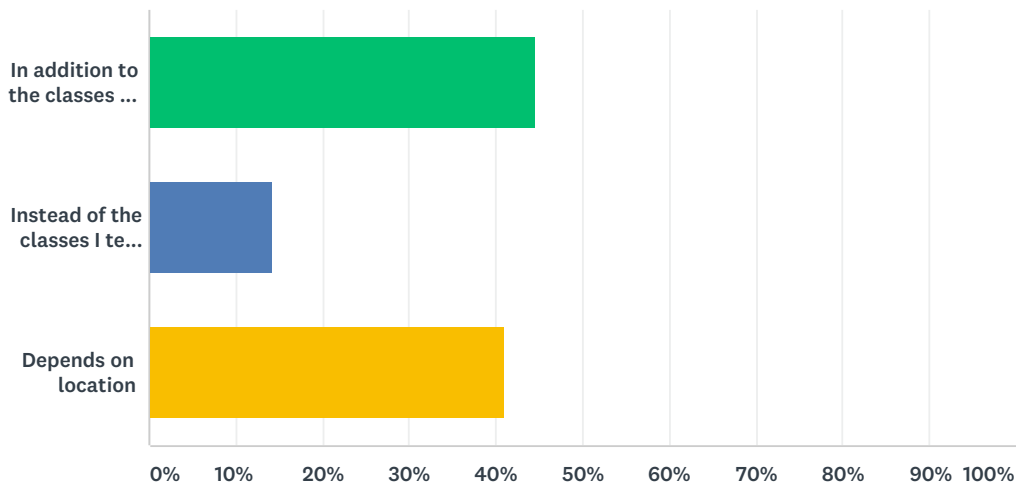
## Copy of Strategic Planning Member and Study Group Leader Survey



ANSWER CHOICES	RESPONSES	
Yes	29.85%	20
No	26.87%	18
Depends on location	43.28%	29
TOTAL		67

**Q50 If you taught at the kind of facility described above, would you teach there in addition to the classes you teach at the Spring Valley Building or instead of the classes you teach at the Spring Valley Building?**

Answered: 56 Skipped: 471



ANSWER CHOICES	RESPONSES	
In addition to the classes I teach at the Spring Valley Building	44.64%	25
Instead of the classes I teach at the Spring Valley Building	14.29%	8
Depends on location	41.07%	23



TOTAL

56

## **OLLI at AU Strategic Planning Focus Groups Summary**

### **April, 2018**

#### **Overall themes:**

- The main sentiment from the majority of the respondents over the 3 sessions is that they love OLLI at AU. In general, they don't want much to change.
- The phrases "don't dilute" or "don't stretch" were used frequently to indicate that participants don't want new initiatives (non-academic activities or satellite locations) to negatively impact what is currently offered. One group articulated it this way:
  - *"A central concern of ours is how with care you expand the community's reach while preserving the core community and its sense of community."*
- They would like more opportunities for academically-connected social interactions: around food, field trips, a replacement for the social benefits of "break."
- Parking is a major stressor and impacts social interactions.
- While there is some interest in satellite locations, especially ones close to AU (or other buildings at AU), the majority of respondents were not in favor of focusing on satellites.
- There was considerable interest in expanding time and days of classes at AU.
- Members want more information about the administration and organization of OLLI: budget and finances, mission, etc.
- Participants are pleased with administration and staff. They are friendly, helpful, registration is easy, and there is good support for SGL's.
- Fundraising efforts are not apparent to most participants.
- Increasing diversity is a desire, although they don't want much else to change in order to increase diversity.
- There were several suggestions that SGLs need training- in adult learning theory, interactive teaching (vs. lecture), how to manage difficult classroom behavior, establishing social interactions in classes. The question was raised as to how SGLs are evaluated.

**Focus Question #1:** As you consider both the academic and social benefits of OLLI, describe what you value most about OLLI.

1. The strongest theme was that respondents come to OLLI for the academics.  
*"The courses are challenging and fun"* *"Intellectually stimulating"*  
*"There are a range of courses that are responsive to people's wants and needs."*  
*"High quality study guide leaders including professors from AU and other institutions"*  
*"Opportunity to take classes outside of my wheelhouse."*  
*"Low risk, non-competitive learning environment."*
2. Many also felt that the social interactions within and around classes are a benefit.  
*"Through the academic you meet people you wouldn't ordinarily meet."*  
*"The life experiences of the students enrich the discussions."*  
*"I like the opportunity to combine the academic and social."*  
*"Forming relationships in classes with like-minded people."*

3. Several respondents stated that there could be more done to foster social interaction within and around classes. Many veterans lamented the loss of “break” where classmates could interact socially.

*“OLLI could do more to integrate the social into classes such as introductions at the beginning, etc.”*

*“SGL’s need to be trained. Too much lecture doesn’t foster social interaction.”*

*“Parking impacts our ability to be social.”*

*“Could there be food here? Sandwiches, etc.”*

4. Some respondents talked about a desire for other social interactions such as coffees, social gatherings at student’s homes, field trips, etc. This was not a strong theme however.

*“It would be nice to have a game group, book group, walking group.”*

5. Other comments:

*“The front office staff is pleasant and helpful”*

*“SGLs get good support from the administration.”*

*“Registration is efficient and easy”* (although some new members questioned how they might get their choices of class. Although registration is easy, they have not yet gotten classes they want).

*“We’d like more interactive classes, less lecture.”*

*“SGLs need to be trained to deal with students who talk too much”*

*“Appreciate the organization of OLLI- the Annual Meeting, including members.”*

Note: there was a distinction made between social activities as an end goal (i.e. coffees, social gatherings) vs. the social interactions that occur through academic endeavors. There was a strong preference for the latter and a desire to enhance the environment and practices to foster more social interactions within and around the academic learning.

**Focus Question #2:** As OLLI matures and innovates, would the addition of non-academic programs, beyond social gatherings, be of interest to you? Might you want to engage in public service activities, mentoring or tutoring in public schools, mentoring AU students, volunteering in the wider community, etc.? Do you believe that these types of opportunities organized by OLLI members, not staff, would be consistent with the mission and attractive to current and future members?

## **Veteran Responses**

The majority of the respondents stated that no, OLLI should not add non-academic programs. Several people questioned whether this would be consistent with the current mission and did not want the mission to change. Many respondents stated that they are very busy, are already involved in community service/activities, and don’t need OLLI to facilitate these activities. Several stated that they would be concerned that other activities would take away from the current academic focus.

*“Overall, these opportunities are available to us from other sources in the community. I would not want to stretch OLLI too far.”*

*“Perhaps OLLI could list opportunities, be a clearinghouse, but not get involved beyond that.”*

*“With a small staff, I’d be reluctant to move into additional activities that could promote “mission creep.””*

*“Social gatherings are OK, and possibly more should be added- e.g. short trips- to provide more opportunity for social engagement. I have reservations about adding other activities outside of the educational program.”*

*“I view these activities as beyond OLLI’s mission and the mission should not be expanded to include them.”*

*“No, this would split members instead of bringing them together.”*

A couple of respondents commented on what they would prefer the focus to be:

*“Rather [than add activities], I’d like to focus on expanding diversity, training SGLs in adult and experiential approaches to teaching, and strengthening the “shorts” and summer mini-courses.”*

*“I would prefer to focus on enlarging the teaching resources so that offerings would continue to grow. E.g. there is very limited use of AU faculty with specializations of interest to members. Also some kind of travel opportunities, e.g. link with Road Scholar.”*

However, other veteran respondents thought the idea of adding non-academic activities is a good one, is consistent with the current mission, and would be something in which they would participate.

*“Yes! This would help OLLI students as well as the community.”*

*“Yes, non-academic activities would be of interest, particularly public service and volunteering in the community. Maybe there could be a Community Service committee to develop meaningful community service activities.”*

*“OLLI should have a Speaker’s Bureau where students and SGLs could volunteer and visit groups like community organizations and discuss matters such as their particular subject s (experts). OLLI likes to hear others- others may like to hear them.”*

*“Yes- Criminal Justice Reform, Hungry School Kids, Homeless School Kids.”*

*“I would love to mentor AU students.”*

*“I think that community services under the auspices of OLLI is a great idea. I am not currently involved and relatively new to the community. An umbrella organization would give me the opportunity to move forward.”*

There was concern about the amount of work non-academic activities would add to staff and/or volunteers.

*“If staff could organize school mentoring it would be very helpful”*

*“Non-academic activities should be conducted by staff, not SGLs.”*

*“I’m dubious this could be done without significant staff involvement” (several people said this)*

*“Adding these volunteer activities will involve major work by members, most of whom may not be interested in taking on more work beyond their existing volunteer commitments.”*

## New Member Responses

The majority of the “new” respondents said that they would like additional, non-academic opportunities. Some said they were too busy personally, but thought it would be good for OLLI and would attract new members. Some stated they thought it is consistent with the mission and several stated they thought the mission could be expanded to include this focus.

*“I feel that offering these types of programs and opportunities to OLLI members would be consistent with the current mission and broaden the base of OLLI members.”*

*“Could be helpful to partner with existing groups in DC to strengthen service/mentoring/tutoring already underway (e.g. DC Alliance of Youth Advocates; Latin American Youth Center)”*

*“I would be interested in participating in public service activities as described above. I could envision that OLLI members would organize a variety of opportunities. This would be an expansion of the OLLI mission as stated but could be quite valuable and attractive to members.”*

*“I would be interested in developing programs for gifted.”*

*“Mentoring and/or tutoring, especially struggling students and those who are in need of role models.”*

*“This expands OLLI’s mission in a worthwhile way but shouldn’t take precedent over OLLI’s current programs.”*

*“It would be an extension of, not conflict with the educational focus.”*

*“In depth learning on a topic and then doing advocacy/PR on that topic.”*

*“Volunteering with AU students would be good.”*

Some said they liked the idea, but worry about stretching the resources.

*“The quality of OLLI courses is first rate. How do you maintain that quality with outreach?”*

*“I’d be in favor if these additional activities were spun off, not under the OLLI umbrella.”*

Some were not in favor (or were cautionary) as they are busy or it doesn’t fit the mission.

*“The named activities do not interest me but I would be interested in more outside activities or local trips- National Gallery with an art historian, Visit a Hindu Temple or Mosque. Lots of local things to do that wouldn’t require transportation. Classroom is sedentary.”*

*“I feel OLLI’s purposes should remain focused on studying and learning in the more traditional sense. There are many other organizations and programs that handle public service activities.”*

*“Before OLLI engages in public service activities it needs to become more diverse.”*

*“No harm in careful experimentation, but don’t overreach or destroy what you have.”*

**Focus Question #3:** The hypothetical scenario activity asked respondents to provide pros and cons to the provided options for the Board’s response to the budget situation and membership growth, to choose the one they thought the best course of action, and/or to provide other solutions.

Options:

1. We see lifelong learning as OLLI’s public service mission for the entire Washington-area community and support significant and continued member and class growth with the addition of satellite locations. Please consider how expansion into satellite locations might affect the strength of the OLLI community in the Spring Valley Building.

2. We support moderate member growth that allows us to remain in the Spring Valley Building exclusively by expanding the calendar and extending the hours to the extent possible to accommodate a limited number of additional classes and members, which will increase revenue.

Note: There was confusion/concern in some of the sessions about the “hypothetical” nature of the question that limited the ability of some to respond. There were questions about the budget, the deficit, and actual vs. desired growth that to which many wanted answers.

### **Veteran Responses**

There were seven veteran groups who responded, and four individual respondents (who felt they could not work together as a group). Of the seven groups, two did not state a preference, four chose option #2 and one chose option #1. Of the individuals, one did not indicate a preference and three chose option #2. In addition, one member of a group of four people that chose option #2 was “enthusiastic” about option #1. Overall, there was a preference for option #2.

### **Option #1**

#### Pros:

- Can keep in touch and depend on technology for communication outside class
- Autonomos bus routes to solve parking and limited transportation
- Satellites could alleviate parking problems at Spring Valley
- Should be explored in context of budget
- Would like more diversity/this allows for and is driven by diversity goals
- Increase diversity and attract new and perhaps more diverse study groups leaders
- Build on what OLLI is and has accomplished and add other things to augment it
- Could people sign up for one class at satellite locations?
- Increase participation and might foster expansion/location might work for more people
- Would perhaps allow for greater class topic diversity
- Could allow for people from other zip codes easier access
- Choose places near metro, e.g. Logan Circle and Capital Hill

#### Cons:

- More sites mean higher cost, particularly for staff
- Less social cohesion
- Too expensive? Rent in metro area is high
- Have to discuss expansion of curriculum if in other locations
- Would not travel for classes
- Concern that satellite locations might not have a variety of classes
- Fear of loss of social interaction
- Travel to satellite locations/Difficulty of travel to other destinations
- Lose some SGLs from Spring Hill
- Diluting OLLI quality a concern
- One goal for Spring Hill was to have everyone in the same place
- Not seeing your friends

## **Option #2**

### **Pros:**

- Room to expand in Spring Valley if we use time and space in expanded calendar
- Using it evenings and weekends are good
- Need more classroom space from AU
- Allows us to use classrooms more efficiently; assume we are not maxing out current use
- Requires less office space
- Location is good/More convenient locations for some
- We do support extending hours, including afternoon, evening and weekend classes to lead to moderate membership growth. This might also lead to participation by younger & semi-retired members.
- Could attract working people at extended hours
- Most of our group supported this option if parking is resolved
- Add a fourth class where strategic
- Add night class during the week
- Moderate growth brings in new blood, new ideas, more potential SGLs, increase OLLI revenue
- Preserves more of quality experience- defined as size of group
- Smaller groups, more chance to get to know folks
- One locations works and has led to increased membership
- Costs would be lower

### **Cons:**

- Limit to expansion and diversity
- Bad parking and limited transportation
- Uninviting food situation
- Space not adequate
- Am against any growth as hard to get into classes - if new members, they should NOT go into the lottery (individual respondent)
- Limited opportunities for growth
- More rush hour travels with extended hours
- Availability of building for other hours
- Impact of community
- More competition for classes possible
- Need for new SGLs- is it feasible to add a lot more?
- Attracting younger & semi-retired people doesn't add anything to the program.
- Reduce value of a single location

## **Other Options:**

- Might we explore affiliating with UDC which might eliminate need to pay rent or reduce rent? UDC is on the Metro and might lead to greater diversity and options for class times./Outreach to UDC or Howard U.
- Don't pursue growth for its own sake. Need data to judge.
- Partner with other OLLIs in the region to share expenses and opportunities.
- Satellite for lectures at noon hour to attract business people and diverse groups
- Blend aspects of both option #1 and #2



- Looking at all of DC as your target is too wide
- Get AU to improve parking- its the defining element for growth and maintenance
- Stay with Option #2 but add one local stellite
- Add second campus nearby to be integrated with current class schedules. Include shuttle
- Get classroom space in other AU buildings or Spring Valley floors and keep 9:45-3:15./More space at AU
- Experiment with satellite location- test it out for cost, feasibility, registration, parking/metro
- Trimesters might work
- Calendar expansion

#### **Ideas to Make \$** (from an individual respondent)

- Basic membership fee just to be an OLLI member
- Fundraising could be more effective

#### **Questions**

- What is the budget?
- Is there a real deficit?
- Why does “more members” lead to higher tuition/cost (if we use space we already have)?

#### **New Member Responses**

Of the seven “new” groups that participated, only two gave a preference for an option, and both chose option #2.

#### **Option #1**

##### Pros:

- More diverse and larger student body
- Expanded diversity- race, culture, age, ethnicity
- Diversity-may need to change the fee structure- scholarships, fundraising
- The importance of more perspectives and variety of thoughts
- Increasing membership/ more people would have the opportunity to attend OLLI who currently have (or would have) a difficult time getting here
- Serving the greater DC area
- More convenience/less travel for some
- More different kinds of learning opportunity- variety
- Increased classes + increased members= increased revenue
- Classes would be smaller
- Things like yoga- might be sponsored by OLLI at a yoga studio- a way to support the community

##### Cons:

- Expensive, diluted focus
- Costs would go up since fees would have to go up?
- Needs significant new funding (perhaps grants)
- Additional fundraising needed
- Cost of rent
- Transportation challenges/ some not willing to travel to other locations



- Challenge for current community to participate at different (sites?)
- Impact on sense of community? Possibly dilute it
- Weakening of core OLLI Community
- Scheduling could be difficult
- Parking
- Competition with OLLI in Montgomery County or any other OLLIs?

## **Option #2**

### Pros:

- Stay as is- we like what we have.
- Expanding calendar and membership. Saturday classes.
- Reasonable growth options i.e. expanding hours and calendar- more courses in Jan & Feb.
- Manageable- keep it that way. Focus=courses.
- Strengthen the love of what OLLI/AU has achieved.
- Reduces the risk that OLLI would dilute its achievements by an aggressive expansion
- Increased revenue from increased members
- No additional rent/ more at same location doesn't necessarily increase expenses
- Late afternoon/early evening
- This is a good idea for pursuing either scenario

### Cons:

- Current offerings could become stale
- AU restrictions
- Conservative approach- no actions for the future
- Lack of transportation/access- distance
- Possibly too much crowding- courses too large- getting rejected from course offerings
- Sets limits to who can participate
- Parking

## **Other Options/Suggestions:**

- Elite membership/ rethink cost structure: cost by single class vs. cost by semester/year
- Pay parking up front
- Stay with option #2 but build out option #1 over next 5 years
- Explore experiences of other OLLIs
- How might we work with other satellites (OLLI or OLLI-like groups) that already exist?
- Courses more relevant to diverse communities
- Explore having courses at senior living communities
- Perhaps more 4-6 session classes year round
- Expand satellite to offer courses that get oversubscribed (i.e. current events)
- Not an either/or: maybe moderate growth but with a single satellite with ease of access (i.e. UDC/ Van Ness)
- Raise fees (by 10%?) to cover deficit

## **Questions**

- How is money budgeted? Hard to make recommendations not knowing.
- How are students allocated to classes?

## **35 Ideas to Help Improve an OLLI's Relationship with their Host University or College**

### **Collect Information (round up)**

1. Include a goal in the Institute's next Strategic Plan to "Improve Relationships and Collaborations with the University"
2. Collect as many metrics as possible from members on their alumni status, parents/grandparents of alum or current students, residence proximity to campus, university emeritus faculty or staff status, season ticket holders to University events/athletics, previous volunteer service to university causes or collaborations, giving history of contributions to university fundraising campaigns, previous career expertise to use in describing the credentials of the OLLI membership
3. Cross tabulate OLLI membership rosters with university development donor lists to build a quantifiable list of the number of OLLI member donors, ideally with the value of their donations to the university (take special care to maintain confidentiality of data for members and consider only releasing the information in aggregate)
4. Carefully read the university's current strategic plan, including the mission, vision and purpose statements to find associations with, or relevance to OLLI activities, collaborations or engagement
5. Meet with the division head or dean to whom the OLLI reports to learn about and fully understand her/his priorities, vision, strategic plan, and initiatives to find potential OLLI collaborations or engagements
6. Carefully track and document the relationships and collaborations between the OLLI and the university community for reference and posterity
7. Individually contact deans, unit directors, cultural and athletic venue managers, and relevant department heads to inquire about what events or projects they are interested in having OLLI members become knowledgeable about. Get on their email lists to receive updates and information as it is released

### **Collaborate & Attend (show up)**

8. Intentionally schedule OLLI events using available public spaces on campus and university food services
9. Adopt a specific athletic team, becoming OLLI boosters to that team (i.e. OLLI at The University of Alabama with adaptive athletics)
10. Identify and make contact with university researchers and health science departments interested in older adults to offer potential participant subjects or citizen scientist assistance in their work
11. Partner with another campus department/organization/group to co-present a lecture or celebrity appearance. Invite OLLI supporters from throughout the university community
12. Build a mentoring program matching OLLI members with undergraduate or graduate students based on topic (i.e. former policy makers with Public Policy program students)
13. Ensure member attendance at university events, particularly events that are open to all students and staff and feature university-wide announcements from top leadership
14. Organize member attendance at university events or performances and make sure that members wear something that identifies them as an OLLI member (i.e. purchase tickets to a classical music performances where OLLI members wear a button identifying their OLLI affiliation)
15. Pay to book university mascot appearances at OLLI celebrations and events
16. Collaborate with the university HR department to offer a free trial membership or course at the OLLI for newly retired staff or faculty
17. Collaborate with the university Alumni Association to offer discounts on fees or membership with the OLLI

## **Spread the Good News (speak up)**

18. Create talking points to share with members on the achievements and milestones of the university and other campus community organizations
19. Systematically and consistently (but authentically!) send formal expressions of thanks to leaders, deans, administrators, staff and faculty on contributions they or their departments have made to help OLLI. Copy supervisors or colleagues as appropriate (best coming from a variety of volunteers and members)
20. Write positive letters to the editor of campus or community media sources regarding university achievements
21. Find opportunities to promote the OLLI in broader local media and intentionally emphasize the cooperation and positive partnership with the university
22. Create an Annual Report for the university president, provost and deans, including the contributions and collaborations from the OLLI that support the core mission and strategic plan of the university
23. Collect university event information and publicize a calendar of events to members in newsletters, digital boards, Facebook posts, and class announcements
24. Select a university publication(s) and become a paid sponsor. Use the opportunity to applaud relevant university efforts while promoting the OLLI as an engaged partner
25. Compile a listing of the benefits that the university provides to OLLI members and publish it in newsletters and in other communication channels
26. Consistently invite university leaders to key events, celebrations, and OLLI gatherings – without expectation of attendance
27. Create a “Tales of a Great University” lecture series, featuring deans presenting on their colleges, areas of focus and professional missions
28. Proudly wear university colors along with OLLI wearables at university gatherings to visibly reinforce university support by OLLI members

## **Contribute & Volunteer (step up)**

29. Make restricted contributions to the university from specific fundraising efforts within the OLLI toward initiatives, causes, scholarships and projects relevant to the priorities of the OLLI. Find opportunities to use these as special thanks to departments or university colleagues who have been helpful to the OLLI (i.e. an OLLI music scholarship created to honor a key faculty member who has taught for the OLLI)
30. Contribute something(s) of value or fulfilling a shared need on the campus (i.e. Carnegie Mellon’s contribution of outdoor Adirondack chairs throughout campus)
31. Engage and participate in campus community-service events (single day or on-going projects) alongside undergraduate student volunteers
32. Become English language conversation partners with international students through student service department organized efforts
33. Volunteer for university arts organizations, performing centers, and athletic venues as docents or ushers (track all this engagement)
34. Use OLLI funds to upgrade the technology in university shared classroom spaces, making sure to consult with co-users and to recognize the value contributed by OLLI
35. Collaborate with the university campus store to present a small line of OLLI at \_\_\_ merchandise and encourage members to patronize the store

## ANALYSIS OF THREE GROWTH SCENARIOS

At the April 2018 meeting of the OLLI at AU Board of Directors, Deputy Executive Director Tony Long distributed data tracking membership growth in recent years and an analysis of three possible options for accommodating more members. The first option assumes continued growth in 4801 in the current schedule and number of classrooms. In this model, OLLI at AU is currently at 83 percent capacity with 2,225 seats filled of 2,692 available (467 empty seats). Adding members without increasing the number of seats will result in a more competitive lottery. However, by carefully honing curriculum to ensure the highest quality of classes, Tony argued that high levels of member satisfaction can be maintained.

The second scenario envisions a moderate extension of the class schedule (i.e. early morning, late afternoon, weekend, etc.), or a small increase in the number of classrooms available, or a fuller academic calendar. Some of these possibilities, such as more classrooms or an extended schedule, are entirely dependent on AU.

The final scenario envisions renting space outside of 4801. Tony noted this option comes with increased staff and rent costs and unknown revenue increases.

### GROWTH PATTERN:

OLLI at AU's annual membership has increased as follows:

1. 2014/15 to 2015/16, membership increased 3.43% (net increase of 42)
2. 2015/16 to 2016/17, membership increased 5.99% (net increase of 76)
3. 2016/17 to 2017/18, PROJECTED membership increased 3.72% (PROJECTED net increase of 50)
4. 2017/18 to 2018/19, PROJECTED membership increase 4.38% (avg. of previous 3 yrs) (PROJECTED net increase of 61)
5. 2018/19 to 2019/20, PROJECTED membership increase of 4.38% (PROJECTED net increase of 64)

### GROWTH OPTIONS:

#### 1. EXISTING SPACE/SCHEDULE at 4801:

- a. Our current space utilization (by semester) is as follows:
  - i. Spring 2018: 82.65% of capacity (2225 seats filled of 2692 available=467 empty seats)
  - ii. Fall 2017: 85.75% of capacity (2182 seats filled of 2550 available=368 empty seats)
  - iii. Spring 2017: 76.42% of capacity (1961 seats filled of 2566 available=605 empty seats)
  - iv. Fall 2016: 80.76% of capacity (2049 seats filled of 2537 available=488 empty seats)
- b. We have room to grow in our existing framework by continuing to hone curriculum to offer courses we know our members want and by marketing OPEN courses post-lottery.
- c. This option requires no (minimal) additional costs.

#### 2. ADDITIONAL SPACE/SCHEDULE AT 4801:

- a. This option will have additional costs (staff/rent) and is completely dependent upon American University's space/time availability.

#### 3. ADDITIONAL SPACE/SCHEDULE BEYOND 4801:

- a. We can rent/use space outside of 4801 to accommodate additional members, to increase diversity, and to have a presence in other parts of the city.
- b. This option comes with increased costs (staff/rent) and increased revenue (unknown). A cost/benefit analysis would have to be conducted for this option.



## Membership Report

	2017/2018	2016/2017	2015/2016	2014/2015	
Fall Members (Gross)	1050	1073	1035	981	Members who have a Fall payment
Fall Refunds	68	79	74	65	Members who received a Fall refund
<b>Fall Members (Net)</b>	<b>987</b>	<b>994</b>	<b>961</b>	<b>916</b>	Members who have a non-refunded Fall payment
Fall New Members	159	199	206	327	Members whose Semester Joined is Fall
Fall SGLs	102	95	100	101	Members who are teaching in Fall
Spring Members (Gross)	1082	967	950	950	Members who have a Spring payment
Spring Refunds	51	44	64	37	Members who received a Spring refund
<b>Spring Members (Net)</b>	<b>1024</b>	<b>923</b>	<b>886</b>	<b>913</b>	Members who have a non-refunded Spring payment
Spring New Members	186	132	131	185	Members whose Semester Joined is Spring
Spring SGLs	97	94	99	93	Members who are teaching in Spring
Minis Members (Gross)	303	303	0	0	Members who have a Minis payment
Minis Refunds	6	6	0	0	Members who received a Minis refund
<b>Minis Members (Net)</b>	<b>297</b>	<b>297</b>	<b>0</b>	<b>0</b>	Members who have a non-refunded Minis payment
Minis New Members	37	37	0	0	Members whose Semester Joined is Minis
Minis SGLs	24	15	0	0	Members who are teaching in Minis
Shorts Members (Gross)	305	272	299	226	Members who have a Shorts payment
Shorts Refunds	6	5	32	14	Members who received a Shorts refund
<b>Shorts Members (Net)</b>	<b>299</b>	<b>267</b>	<b>267</b>	<b>212</b>	Members who have a non-refunded Shorts payment
Shorts New Members	17	20	33	37	Members whose Semester Joined is Shorts
Shorts SGLs	23	18	15	14	Members who are teaching in Shorts

Total Unique Members (academic/fiscal year)	1393	1343	1267	1225	Members who have a non-refunded payment for Fall, Spring, Minis or Shorts
---	------	------	------	------	---

GROWTH:                      3.72%                      5.99%                      3.43%

**FRIENDS OF OLLI / AU INVESTMENT FUND**

**Five-Year Projections**

	2018/19	2019/20	2020/21	2021/22	2022/23
<b>INCOME</b>					
Beginning FY	\$ 1,002,048.00	\$ 1,021,334.00	\$ 1,065,074.00	\$ 1,105,119.00	\$ 1,117,647.00
Operating Surplus	\$ 50,624.00	\$ 48,974.00	\$ 46,321.00	\$ 19,959.00	\$ 15,850.00
Fundraising <b>1/</b>	\$ 75,000.00	\$ 78,000.00	\$ 81,120.00	\$ 84,365.00	\$ 87,739.00
Interest/Dividends	\$ 17,786.00	\$ 18,675.00	\$ 19,609.00	\$ 20,560.00	\$ 21,619.00
<b>INCOME SUBTOTAL</b>	<b>\$ 1,145,458.00</b>	<b>\$ 1,166,983.00</b>	<b>\$ 1,212,124.00</b>	<b>\$ 1,230,003.00</b>	<b>\$ 1,242,855.00</b>
<b>EXPENSES</b>					
Expenses <b>2/</b>	\$ 37,430.00	\$ 20,000.00	\$ 21,000.00	\$ 22,050.00	\$ 23,153.00
FOI 5% Distr.	\$ 51,747.00	\$ 54,334.00	\$ 57,051.00	\$ 59,904.00	\$ 62,899.00
Capital Expenses <b>3/</b>	\$ 21,500.00	\$ 10,000.00	\$ 10,500.00	\$ 11,025.00	\$ 11,576.00
MS Mgmt Fees <b>4/</b>	\$ 13,447.00	\$ 7,500.00	\$ 7,875.00	\$ 8,269.00	\$ 8,682.00
<b>EXPENSES SUBTOTAL</b>	<b>\$ 124,124.00</b>	<b>\$ 91,834.00</b>	<b>\$ 96,426.00</b>	<b>\$ 101,248.00</b>	<b>\$ 106,310.00</b>
Surplus / (Deficit)	\$ 1,021,334.00	\$ 1,075,149.00	\$ 1,115,698.00	\$ 1,128,755.00	\$ 1,136,545.00

**1/** Figures shown are conservative estimates, not goals.

**2/** The Fundraising Expenses shown have been front-end loaded because of the acquisition of new software in FY 2018/19. Fundraising expenses in subsequent years should be substantially lower. We have estimated Fundraising Expenses of \$20,000 for 2019/20 with a 5% per year increase thereafter.

**3/** Capital Expenses amount shown for 2018/19 includes an extraordinary item (additional hearing loops). We have estimated Capital Expenses of \$10,000 for 2019/20 with a 5% per year increase thereafter.

**4/** The Investment Subcommittee of the Finance Committee is considering ways in which to decrease investment advisory fees. The anticipated effect of any such changes, if proposed and approved, is shown above.

	2018/19	2019/20	2020/21	2021/22	2022/23	Comments/Assumptions
<b><u>OPERATING INCOME</u></b>						
Member Fees (minus refunds)	\$ 621,512.00	\$ 646,732.00	\$ 672,227.00	\$ 699,116.00	\$ 727,081.00	+4% / ann - no fee hike
Osher Endowment	\$ 116,550.00	\$ 122,378.00	\$ 128,496.00	\$ 134,921.00	\$ 141,667.00	+5% / ann
FOI 5% Distribution <b>1/</b>	\$ 51,747.00	\$ 54,334.00	\$ 57,051.00	\$ 59,904.00	\$ 62,899.00	+5% / ann
<b><u>TOTAL OPERATING INCOME</u></b>	<b>\$ 789,809.00</b>	<b>\$ 823,444.00</b>	<b>\$ 857,774.00</b>	<b>\$ 893,941.00</b>	<b>\$ 931,647.00</b>	
<b><u>OPERATING EXPENSES</u></b>						
Salaries and Benefits	\$ 431,120.00	\$ 452,676.00	\$ 475,310.00	\$ 522,841.00	\$ 548,983.00	+5% / ann <b>3/</b>
Facility Rental/Parking	\$ 149,007.00	\$ 154,967.00	\$ 161,166.00	\$ 167,613.00	\$ 174,317.00	+4% / ann
Insurance	\$ 7,972.00	\$ 8,371.00	\$ 8,789.00	\$ 9,229.00	\$ 9,690.00	+5% / ann
Part-Time Staff	\$ 4,675.00	\$ 4,909.00	\$ 5,154.00	\$ 5,412.00	\$ 5,682.00	+5% / ann
Office Expenses <b>2/</b>	\$ 50,596.00	\$ 53,126.00	\$ 55,782.00	\$ 58,571.00	\$ 61,500.00	+5% / ann
Special Events (net)	\$ 18,030.00	\$ 18,932.00	\$ 19,878.00	\$ 20,872.00	\$ 21,916.00	+5% / ann
Online CC Fees (banks)	\$ 18,375.00	\$ 19,110.00	\$ 19,874.00	\$ 20,669.00	\$ 21,496.00	+4% / ann <b>4/</b>
Acc't / Legal / Professional	\$ 26,700.00	\$ 28,035.00	\$ 29,437.00	\$ 30,909.00	\$ 32,454.00	+5% / ann
Equipment & Software	\$ 32,710.00	\$ 34,346.00	\$ 36,063.00	\$ 37,866.00	\$ 39,759.00	+5% / ann
<b><u>TOTAL OPERATING EXPENSES</u></b>	<b>\$ 739,185.00</b>	<b>\$ 774,472.00</b>	<b>\$ 811,453.00</b>	<b>\$ 873,982.00</b>	<b>\$ 915,797.00</b>	
Operating Surplus / (Deficit)	\$ 50,624.00	\$ 48,972.00	\$ 46,321.00	\$ 19,959.00	\$ 15,850.00	

1/ Used \$51,747 from budget as base for projections; the balance in FOI account as of 5/31/18 was \$1,002,048.

2/ Includes Printing and Copying, Postage and Delivery, Trips/Conferences/Training, Office Support, Payroll Service and Publicity expenses.

3/ Except one-time 10% increase in 2021/22 for an additional staff member.

4/ Same as Member Fee growth rate.





## Final Report

*May 22, 2018*

Anne Aaron, Patrice Feinstein, Thomas Fulcher, Ian Green, Heather Koslov, Robert Motyka, Caroline Simon, Judith Spector, Sammi Zhang

---

# Agenda

---

1. Revised consulting question
2. Summary Findings and Recommendations
  - Improve Financial Management
  - Strengthen Relationship with AU
  - Enhance Revenue Opportunities
  - Other OLLI Survey
  - DC Market data

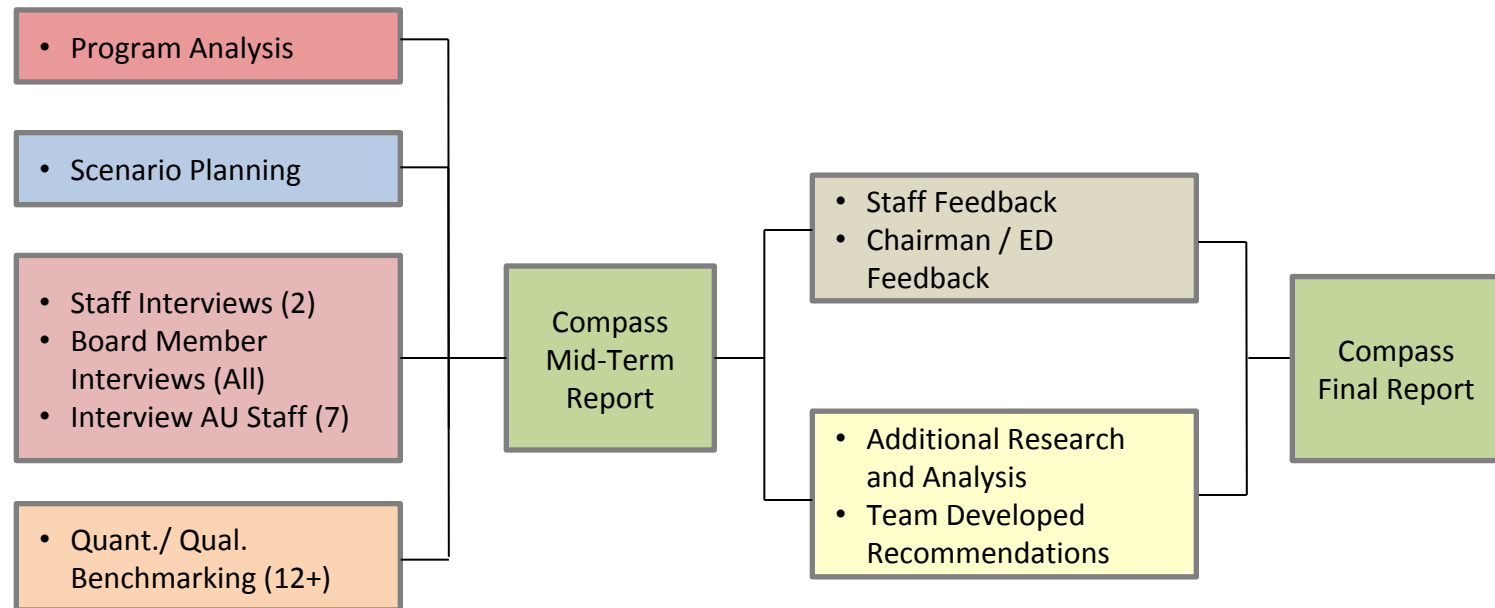


---

# ENGAGEMENT OVERVIEW



# Findings Roadmap for Mid-Term Report



- The Compass team gathered and analyzed a variety of data to understand the challenges and opportunities for OLLI @ AU



---

# Consulting Question

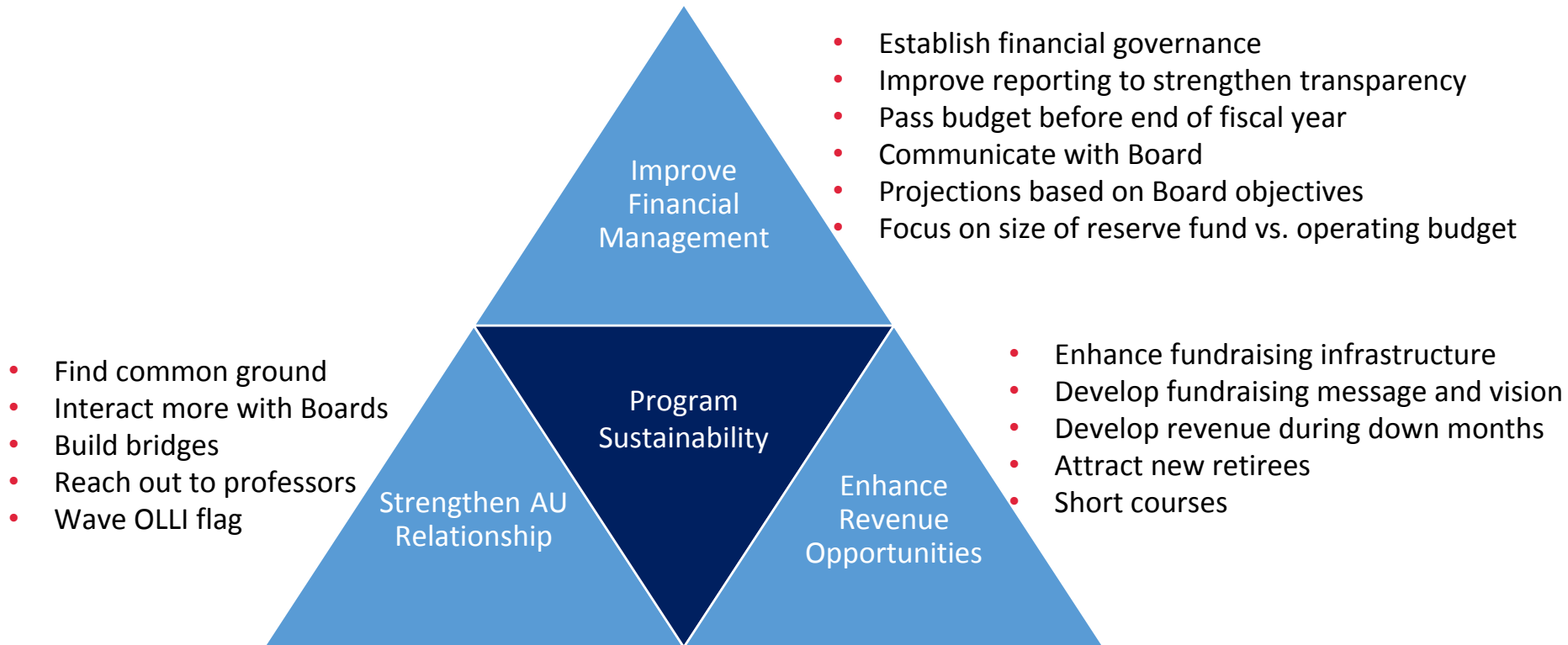
---

- How can OLLI build upon and support a large and growing membership including improving their partnership with American University?
  
- **Revised question: How can OLLI @ A.U. minimize any operational risk and maximize program sustainability?**



# Strategic Alignment

**OLLI must improve in three (3) critical areas to ensure that it is on a sustainable path.**



---

# Improve Financial Management



---

# Financial Findings Takeaways

---

- OLLI Revenues have experienced substantial growth in the last five years.
  - Expenses have climbed faster than revenues over the same period: net asset growth has slowed.
  - External funding sources ("Friends of OLLI" reserve fund and limited fundraising) have kept OLLI in a positive position: tuition and income from Osher fund alone will not suffice.
  - Reliance on reserve fund is starting to impair Board custom to maintain floor of one-year's expenses (which will keep growing).
- 2018 and going forward, OLLI's financial position is starting to appear tenuous and at risk in a number of areas:
  - Sources of future revenue are uncertain
  - Expenses may not be easy to control
  - Transparency and financial management practices are not ideal - maintaining two sets of financial books creates audit and strategic planning confusion





---

# Summary of Financial Management Recommendations

---

- Create Finance Committee of the Board
  - Assign roles and responsibilities
- Improve Financial Transparency and Financial Dissemination
  - Work with staff
- Match financial objectives with strategic objectives
  - Integrate financial projections with strategic plan



---

# Roles and Responsibilities of a Finance Committee

---

## **Recommended Mission: To ensure long-term solvency**

- Develop annual operating budget with assistance from staff
- Present budget to Board; receive Board approval
- Monitor adherence to the budget
- Set long-term financial goals and recommend policies that contribute to OLLI's financial health
- Ensures the filing of all legal and financial documents and the appropriate outside review or audit and review results
- Creates, approves, and updates (as necessary) policies that help ensure the "Friends of OLLI" funds are protected
- Develop multi-year operating budgets that integrate strategic plan objectives and initiatives



---

## Finance Committee: Specific Recommendations

---

- Investigate and recommend a new reserve policy to the Board
  - Establish and communicate the objective of the fund to be a durable buffer that allows for long-term planning of capital expenditures
  - Examine the assumptions behind rainy-day amount
  - Establish clear guidelines for intra-year lending
- Maintain one set of books
  - Clearly delineate the budget between normal (“business-as-usual”) items and non-ordinary (non-recurring) items
  - Maintain consistency throughout the year
  - Integrate fund-raising revenues and expenses into BAU budget using conservative assumptions
- Oversee budget planning and projections
  - Develop and pass budget prior to start of the fiscal year
  - Recommend appropriate time horizon planning not to exceed 5 years
  - Stress test the budget: e.g., what are consequences if revenues fall?



---

## **ENHANCE REVENUE OPPORTUNITIES**

- Tuition/Fees/Programming**
- Fundraising**



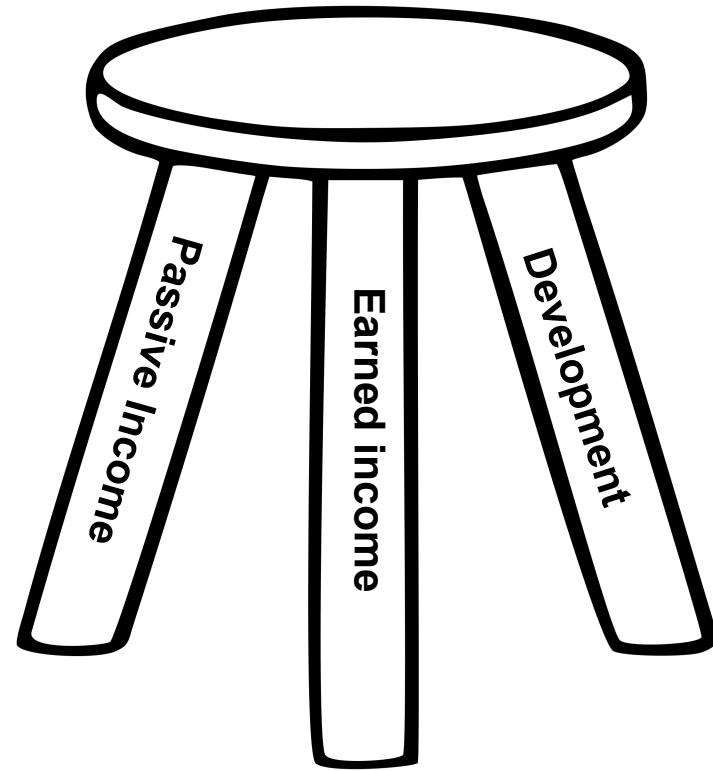
---

# Resource Development is Essential to OLLI's Financial Strength

---

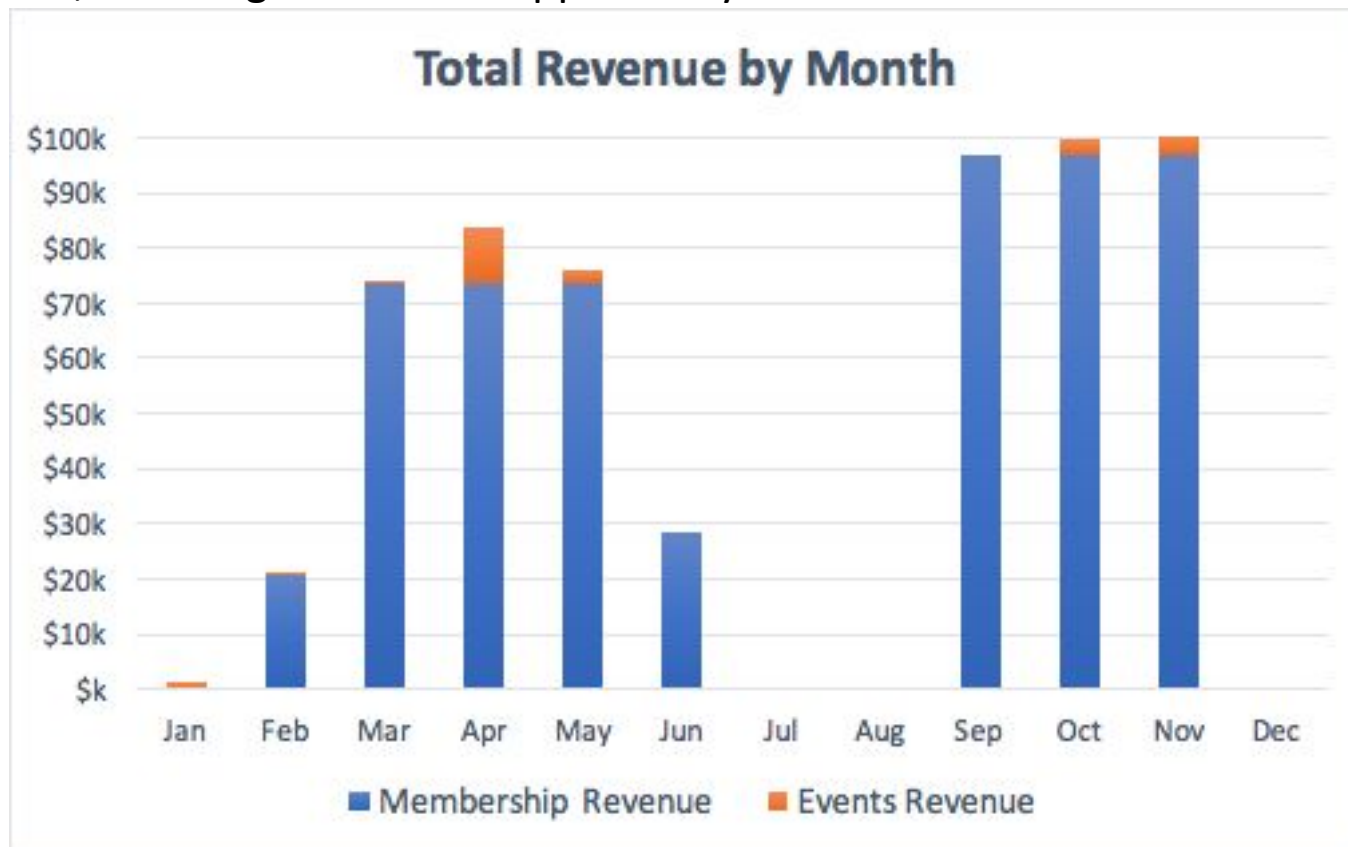
OLLI's financial strength rests on three pillars:

- **Earned Income**  
(membership/course fees)
- **Passive Income**  
(endowment distributions)
- **Resource Development**  
(donations)

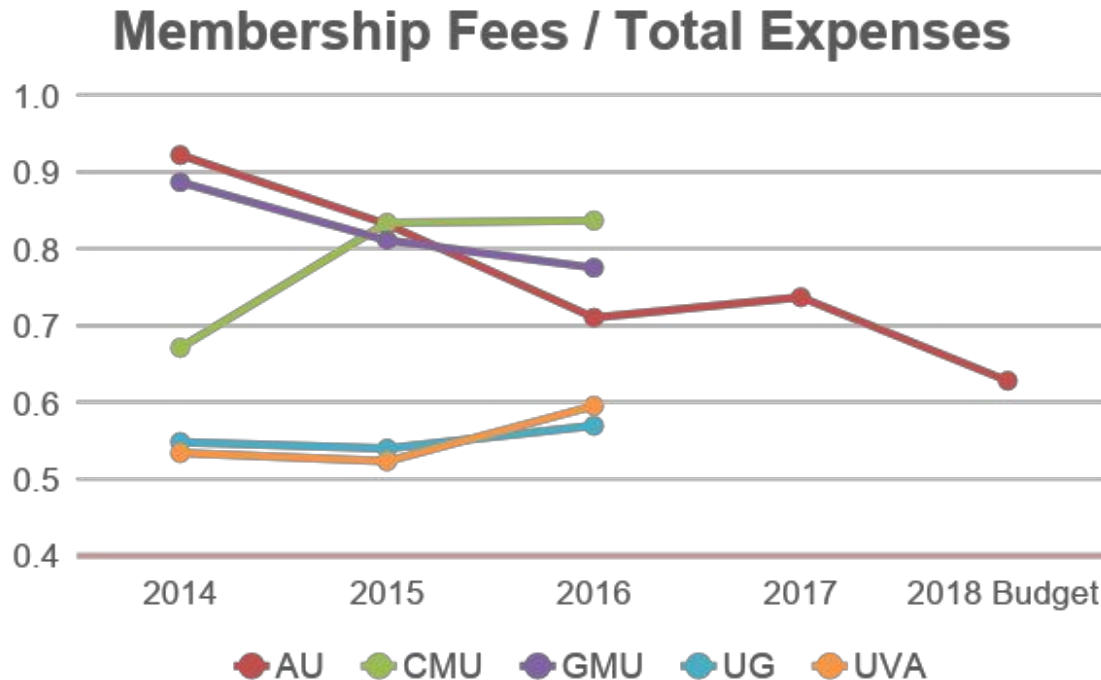


## 33% of the year generates \$0 in revenue

- During the months, of December, January, July, and August, OLLIs fixed costs continue, resulting in a missed opportunity for earned income



# OLLI 501(c)(3) Benchmarking



- OLLI @ AU's membership fee income covered over **92% of the total expenses in 2014**. This ratio has continued to decline over the past years. In the 2018 budget, the membership fee only covers **63% of total expenses**.
- AU was top-ranked in expense reliance on membership fees in 2014, however it is losing it is advantage.



---

# Revenue Pilot Opportunities

---

New Revenue Sources	Total Revenue Increase
Winter Semester	\$150,000
July Shorts	\$24,000
Shorter Class to Create a New Time Slot during Fall/Spring	\$42,500
A New Classroom during Fall/Spring	\$30,000
Raise Membership Fee by 10%	\$50,000

1. Assuming 600 members and \$250 membership fee for winter semester
2. Averaging the Feb shorts and June Mini revenue for July Shorts
3. A new time slot can host 20 more study groups and 140 new spots for membership
4. One more classroom can host 14 more study groups and 100 new spots for membership

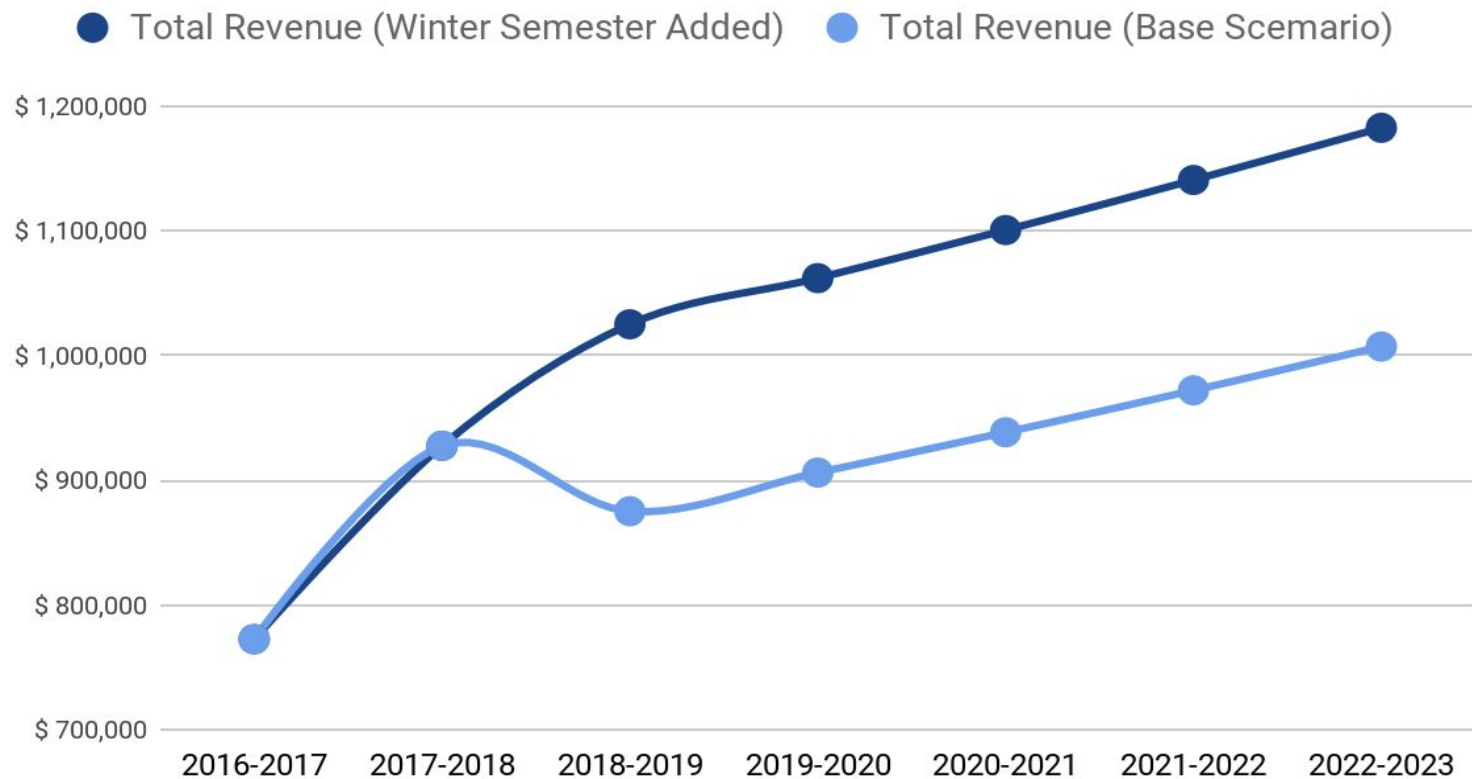




# Revenue Enhancement Impact to Budget

- *Use Winter Semester as an example*

## Winter Semester Impact on Total Revenue



---

# OLLI Development Activities and Opportunities: Summary of Findings

---

- There is a wide range of opinions among OLLI Board members about the importance of fundraising as a component of financial health and development experience is not a criteria for selection to the Board.
- OLLI has invested in some development tools, but has not yet built the infrastructure necessary to meet the needs of a strong, consistent fundraising program.
- OLLI has not yet developed a clear strategy or consistent messaging to communicate with donors and prospective donors.
- The importance of and commitment to development is not yet a part of OLLI's organizational culture. Institutional needs and goals have not been aligned with fundraising activities and opportunities.



---

# OLLI Development Activities and Opportunities: Overview of Recommendations

---

OLLI will benefit from a long-term commitment to four key areas of resource development:

- Build Organizational Capacity
- Commit to Best Practices in Stewardship
- Formalize Development Planning & Programming
- Align Communications with Institutional Goals



---

# OLLI Development Activities and Opportunities: Recommendations

---

## **BUILD ORGANIZATIONAL CAPACITY**

- Expand Fundraising Committee, including Board members
- Allocate staff time to focus on fundraising activities
- Invest in staff training and professional development (fundraising workshops, seminars, eTapestry training)
- Recruit board members who have fundraising experience
- Hire at least one AU work-study student every semester to assist with donor tracking efforts, data entry, gift acknowledgments
- Invest in professional consultant(s) to lead development strategy, prospect research



---

# OLLI Development Activities and Opportunities: Recommendations

---

## COMMIT TO BEST PRACTICES IN STEWARDSHIP

- Routinize the process of acknowledging gifts
- Track all donors and follow up with them at regular intervals
- Build and maintain prospect lists/targets
- Set ambitious but achievable fundraising goals
- Communicate regularly with stakeholders about fundraising progress
- Partner with AU development office to have the university directly acknowledge charitable contributions to OLLI
- Integrate development into OLLI's organizational culture



---

# OLLI Development Activities and Opportunities: Recommendations

---

## FORMALIZE DEVELOPMENT PROGRAMMING

- Establish formal channels for donors to direct their gifts to OLLI
  - Annual Fund (general operations)
  - Anne Wallace Fund (staff development)
  - Scholarship Fund
  - Technology Fund (tech infrastructure/upgrades)
  - Special Programming Fund
- Establish an annual lecture as a fundraising event - a one-time “paid ticket,” perhaps with a wine-and-cheese reception
- Have OLLI volunteers solicit in-kind donations for auction fundraiser
- Seek content-appropriate sponsorships, e.g., sponsored pages in course catalogue, underwriting for major lectures



---

# OLLI Development Activities and Opportunities: Recommendations

---

## ALIGN COMMUNICATIONS WITH INSTITUTIONAL GOALS

- Clearly articulate financial needs to stakeholders
- Release an Annual Report to members about “the state of OLLI”
- Follow up with donors and make clear how donations are used
- Use OLLI letterhead/branding for all fundraising communications, including email and other electronic communications
- Maintain clear, accessible website with a “donate” button on every page
- Have Board Member visit every OLLI classroom and appeal directly to members for charitable support
- At appropriate times, place fundraising thermometer in member lounge to reinforce financial goals/needs



---

## Messaging Around Need for Fundraising

---

- ***The Osher endowment belongs to AU, not to OLLI:***
  - Promote the message that OLLI income from the AU Osher endowment covers **less than 10% of operating budget**
  - Reiterate that tuition covers **only 63% of operating budget**, leaving a shortfall of 25% of annual operating budget
  - Use member newsletter to practice financial transparency; do not overstate OLLI's financial stability
  - See appendix for sample fundraising appeal





---

# **STRENGTHEN AMERICAN UNIVERSITY RELATIONSHIP**



---

## OLLI/AU Relationship: Summary of Findings

---

- Most OLLI stakeholders agree that OLLI's relationship with AU is important and should be prioritized. However, OLLI's approach to the relationship has, until recently, been mostly transactional and focused on needs, rather than on a long-term, strategic, mutually beneficial partnership.
- OLLI's relationships with the AU academic community have largely been informal. AU faculty have not routinely been engaged or cultivated either as prospective teachers or as potential future OLLI members.
- In recent years, OLLI has not had a strong institutional relationship with the AU administration.
- OLLI has not made a point of promoting itself as a valuable resource to the AU community.



---

## OLLI/AU Relationship: Overview of Recommendations

---

- Make the OLLI-AU relationship a strategic priority, and weave it into the culture of OLLI.
- Build a mutually beneficial relationship that is not driven solely by needs; cultivate a “win-win” approach to engagement with the university.
- Identify opportunities to add value to the AU community and/or AU’s strategic objectives (e.g., Community Relations, Inclusion)
- Cultivate the relationship at both the **institutional level** and **the individual level**, within the **academic community**, the **university administration**.
- Promote OLLI to the broader AU community.



---

# OLLI/AU Relationship: Recommendations

---

## CULTIVATE **INSTITUTIONAL** RELATIONSHIPS W/ ACADEMIC COMMUNITY

- Increase OLLI awareness of new, current, retiring and Emeriti professors by adding content to Center for Teaching, Research and Learning (CTRL) (in-service) classes
- Develop an outreach program to engage faculty in earning “community service” credit for teaching at OLLI
- Formalize policy of setting aside a **small** number of seats at major OLLI lectures for AU students and faculty
- Extend regular invitations to departments/faculty to lecture at OLLI



---

# OLLI/AU Relationship: Recommendations

---

## CULTIVATE **INSTITUTIONAL** RELATIONSHIPS W/ ACADEMIC COMMUNITY

- Reach out to and establish relationships with Deans of School of Public Policy, Law School, Kogod, Communications, and (when appointed) SIS - with intent to foster collaborations
- Offer OLLI members as mentors to AU students via academic depts., schools and programs
  - Formalize successful pilot program with AU Accelerator students
  - Develop mentoring program between OLLI female attorneys and female law students at Washington College of Law, which has extensive feminist history, programs and resources
- Fund part-time “OLLI fellow” to connect with key academic department for joint programming or study/mentoring participation



---

# OLLI/AU Relationship: Recommendations

---

## CULTIVATE **INDIVIDUAL** RELATIONSHIPS W/ ACADEMIC COMMUNITY

- Strengthen relationships with key AU academic administrators who have been interviewed and are aware of OLLI, e.g., Mary Clark, Dean of Academic Affairs and Senior Vice Provost; Jill Klein, Dean of School of Professional and Extended Studies (See “Contacts”)
- Extend invitations to retiring AU faculty & administrators to join OLLI
- Extend invitations to key individual professors to attend subject-specific OLLI lectures
- Conduct exit-planning outreach to retiring faculty – offer intro to OLLI
- Identify and forge relationships with faculty whose research interests align with OLLI’s, e.g. ex-Provost Bass, whose field is gerontology



---

# OLLI/AU Relationship: Recommendations

---

## CULTIVATE **INSTITUTIONAL** RELATIONSHIPS W/ AU ADMINISTRATION

- Establish an Advisory Board with a clear mission
  - Include OLLI stakeholders - board members, staff, rank-and-file members; and AU stakeholders - high-level administrators & faculty
  - Meet quarterly to generate community programming ideas/collaborations
- Keep tabs on AU strategic planning process and identify opportunities for OLLI to help AU meet its strategic objectives, e.g., Alumni Relations, Community Relations, Inclusion
- Formalize a practice of having OLLI members serve voluntarily on key AU community boards, committees, and working groups



---

# OLLI/AU Relationship: Recommendations

---

## CULTIVATE **INDIVIDUAL** RELATIONSHIPS W/ AU ADMINISTRATION

- Formalize an annual “check-in” between OLLI board chair/executive director and President Burwell
- Strengthen relationships with key AU administrators, who have been interviewed and are aware of OLLI, e.g., Courtney Surls, AU VP of Development & Alumni Relations & Raina Lenney, her deputy.





---

# OLLI/AU Relationship: Recommendations

---

## PROMOTE OLLI TO THE AU COMMUNITY

- Track participation of AU alumni in OLLI and conduct regular outreach/marketing to AU alumni; offer a discount to join OLLI
- Build visibility/engagement w/ AU community by organizing low-cost social programming, e.g., guided tours of AU museums & libraries, Green Campus tour, Arboretum tour, and AU sporting events
- Develop a joint service program for OLLI members and AU students to work together on projects benefiting the AU community
- Advertise Friday lectures and January lectures in “AU in the neighborhood” monthly newsletter @ [American.edu/neighbors](mailto:American.edu/neighbors)
- Utilize campus facilities for special events/programming, e.g., AU Bender Library, Pence Law Library



---

## **DIFFERENT APPROACHES FROM MEETING AND INTERVIEWING OLLI COMPARABLES**



---

# Benchmarking Criteria

---

- Looking to identify a comprehensive group of benchmark sites for OLLI @ AU, the Compass team focused on one main criterion:
  1. Member demographic similarities (affluence, urban, etc.)



---

## Benchmarked OLLI Sites

---

- **Carnegie Mellon University - 501C3**
- Duke University
- Emory University
- **George Mason University**
- Johns Hopkins University
- Northwestern University
- Pennsylvania State University
- Tufts University
- University of Denver
- **University of Georgia**
- University of Miami
- **University of Virginia**
- University of Washington



# Membership Models

<b>Per Session/Annual, including 3 or more classes</b>	
\$130 Annually, unlimited classes	<i>University of Denver</i>
\$60 Annually + \$50/ Session, unlimited classes	<i>Carnegie Mellon*</i>
\$125/\$225 Annually, unlimited classes	<i>University of Pittsburgh</i>
\$150/ Session ( <i>Introductory Rate</i> ); \$425 Annually, unlimited classes	<i>George Mason University*</i>
\$300/\$550 Annually, unlimited classes	<i>Johns Hopkins and A.U.*</i>
\$565 Annually, unlimited classes	<i>Northwestern</i>
<b>Per Class, nominal annual fee</b>	
\$50 Annually, \$50 for 1st class + \$10/ additional class	<i>University of Virginia*</i>
\$50 Annually + \$45/ class (\$25 for shorter 4-week sessions)	<i>Emory, Tufts</i>
\$35 Annually + \$30-45/ class	<i>University of Washington</i>
\$60 Annually + \$10-50/ class	<i>University of Georgia*</i>



---

# Different Approaches Utilized by Benchmarked OLLIs

---

- **Staff**
  - Ranged from 1.5 to 4 full-time staff
  - Augmented by part-time staff, volunteers, **work-study students and interns**
- **Board size**
  - Average **25 members** and with University liaison
- **Locations/off-site classes**
  - **Assisted-living facilities** often pay for classes and pay for sponsorship/advertising in OLLI publications
    - Easy location with parking, microphones, projectors, security, chairs
    - One Olli raised \$300,000 from sponsorships from assisted living facilities
  - Classes in community - community centers, synagogues, libraries



---

# Different Approaches Continued

---

- **Revenue Enhancers**

  - Sponsorships/Advertising**

  - **Get sponsorships from those who serve the OLLI population**
    - Assisted living facilities
    - Travel companies
    - Health care companies
  - **Sell advertising in OLLI publications/emails/wall space within the facility**
    - **Annual Report on website**

- **Fundraising**

  - Planned Giving**

  - Giving as part of an estate sometimes yields larger amounts from donors
  - One OLLI has raised hundreds of thousands of \$'s from planned giving
  - Takes a while to realize the benefits

  - **University acknowledges all gifts to OLLI**



---

# Different Approaches Continued

---

- **Recruiting New Members**
  - 1st time members admitted to class they select
  - **Paired with veteran member**
  - Discounted rate and carefully tracked and reached out to
- **Strengthening Relationship with host University**
  - One OLLI has an arrangement with the university in which OLLI members can audit undergraduate courses
  - **Invite University to popular lectures**
  - **Board/Advisory Committee representation**
  - 10% - 25% of classes taught by University professors
  - **Facebook presence to heighten awareness**
  - **Retirement planning with University faculty includes introduction to OLLI**
  - **Paying small fee to attract graduate and post-doctorate faculty**
  - **Gerontology faculty on Advisory Councils**





---

# Different Approaches Continued

---

- **Programming**

- Significant differences in membership fee structures
- Membership fee + additional fee for every class (e.g. \$50 membership/year + \$25/class) - **Year-round use of facilities**
- One OLLI has seven sessions per year with one week off between sessions—no other downtime
- Some OLLI's have **weekend classes**
- Like OLLI at AU, **evening/late afternoon classes** universally not popular (nobody wants to drive in the dark), except for those attempting to appeal to somewhat younger audiences

- **Parking**

- Parking is a challenge at many OLLI's, sometimes not available at all
- Parking fees are sometimes built into membership to make it less annoying on a daily basis



---

# Market Analysis



## Other Options for Seniors' Continuing Education in D.C.

Program	Cost per Session	Eligibility
Politics and Prose	\$125 / 5-session class	N/A
Montgomery College Lifelong Learning Institute	\$138 / 4-session class; Add \$120 for Non-MD residents	\$258 / 4-session class for non MD residents
Oasis Lifelong Adventure	\$10-50 / session	N/A
Georgetown University	\$50 / class / semester (undergrad)	DC resident, 65+ years
George Washington University	\$65 / class / semester (undergrad)	DC resident, 60+ years
Johns Hopkins (OLLI)	\$560 / year (Columbia/Baltimore) \$600 / year (Montgomery Cty)	
Community Audit Program	\$100 / course	60+ years

# The End

---



## Price Elasticity Among Members

- Despite a tuition increase, attendance shows an uptick in those preferring to take 1 or 2 classes rather than 3





[We need your help to continue to grow our programming.](#)

With more than 90 academic courses offered each semester and a community of over 1,400 members, we are growing at a rapid rate - but our ability to deliver high quality, innovative, and accessible classes depends on **YOU**. At OLLI at AU, **tuition fees cover just two-thirds of our operating costs** and **our OSHER income covers only another 10% of our annual budget.**

[We need our community's full support to offer our diverse educational and cultural programming](#) that builds community, sparks new dialogue in a learning environment, and inspires more meaningful and fulfilling lives.

Your contributions ensure our community continues to thrive. Here are just a few of the ways we have grown to serve you better this year:

- **Installed hearing loops in all our classrooms**
- **Presented two new survey classes taught by AU SIS faculty and Science Department Faculty**
- **Secured the equipment needed to better serve visually challenged community members**
- **Offered XX scholarships, ensuring that all members are able to participate in lifelong learning experiences, increasing the diversity of our community**

Your patronage has brought us this far. **We're counting on your generosity to help us shape the future of the OLLI at AU program.** [Donate today to help us build tomorrow.](#)

Sincerely,  
XXXX

P.S. To show our gratitude for your support, we will be offering Campaign 2020 donors of over \$2,500 a special tour of the AU library rare books collection with scholar-in-residence Heather Koslov later this summer. [Donate today](#) to be included in this special experience!



# SWOT Analysis

## Strengths

- Community (those who attend the classes are interesting and engaged)
- Teachers (interesting classes that often fill to capacity)
- Access to talent (Great speakers for their lecture series)
- Staff (5 FT, year-round staff available to assist with programming and initiatives)

## Weaknesses

- Location not metro accessible
- Classroom space for many Spring and Fall classes and popular lectures
- Board is not unified in long-term vision/mission for fundraising objectives making forward action difficult
- Financial reporting and processes
- No fundraising staff to manage giving program

## Opportunities

- Well poised to strategically develop/improve relationship with American University
- Could program during parts of the year where there is currently no programming to bring in additional revenue
- Continued fundraising efforts could provide opportunities to increase contributed revenue and build OLLI@ AU brand
- Partnerships first with AU Depts. and later with think tanks/other DC institutions could build brand and talent pool

## Threats

- Expenses are exceeding revenue
- No permanent space
- Capacity for growth is limited, younger retirees OLLI might recruit may go elsewhere based on location and on price point
- Other DC Programs for seniors less expensive



---

# Finance Committee composition recommendations

---

## Finance Committee composition

- Chair of Finance Committee:
  - Two year term limit
  - Experienced in financial matters
  - Make committee meetings effective
  - Establish good working relationship with staff
- Members: tight working group
  - 5-6 members (with 2 year rotation)
  - Leverage specific interest, expertise, and commitment
- Advisory Board members
  - Consider third-party independent advisory board from AU community
  - Not more than 2-3 “consultants”





---

# Member Findings - Survey and Focus Group

---

## Size and Space

- 30% of the members are new this school year; over the last 2 years, > 50% are new members to OLLI
- People like size of OLLI (q19)
- People are open to additional study group times and times of year (q5, 6, 7)
- People generally open to traveling - but within NW DC (q20)

## Diversity

- Pretty important - 85% feel diversity is very important or somewhat important (q23)
- Age, racial, socioeconomic, disability all somewhat equally valued

## Volunteering

- 76 people report they volunteer
- Most aren't interested but think volunteer-related outreach is good (q18)

## Fundraising

- People don't seem to be incentivized to donate
- 50%+ of people don't want to donate because they don't understand OLLI's financial needs (32) but 60%+ think fundraising should be method for soliciting funds if necessary (q33)
- Scholarships for OLLI members in need is most attractive cause for donation, followed by general program ops support (q31)

## Relationship with AU

- Members don't really have relationships with AU (q34)
- ~20% of population very interested in OLLI-AU exchange (q36), 6-7% said they attend AU events at least monthly

## Marketing

- Most people find out about joining OLLI through word of mouth (q43)
- Newsletter is important for advertising events (q9)



---

# AU Contacts (as of June 1, 2018)

---

**Clark, Mary;** Dean of Academic Affairs and Senior Vice Provost; [mlclark@american.edu](mailto:mlclark@american.edu); discussed faculty policy. Works directly under Provost.

**Davenport, Nancy;** University Librarian; [davenport@american.edu](mailto:davenport@american.edu); discussed use of library space for events, visits by OLLI to see exhibits, collections, lectures. Works directly under Provost.

**Kaufman, Billie Jo;** Associate Dean of Library and Information Resources, Washington College of Law; [bkaufman@wcl.american.edu](mailto:bkaufman@wcl.american.edu); discussed feminist history of law school and archives, use of library facilities for events and possible joint projects.

**Klein, Jill;** Dean, School of Professional and Extended Studies; [jklein@american.edu](mailto:jklein@american.edu); discussed her vision of potential partnership between OLLI and Prof and Extended Studies.

**Lenney, Raina;** AVP, Alumni Relations, Office of Development and Alumni Relations; [lenney@american.edu](mailto:lenney@american.edu); Courtney's Deputy and Courtney suggested we go to Raina for Alumni issues.

**Quainton, Anthony;** Distinguished Diplomat in Residence, SIS; [quainton@american.edu](mailto:quainton@american.edu); has organized and taught in popular OLLI class on foreign policy issues. Discussed faculty perspective on organizing OLLI classes and need for formalization of process.

**Rutenback, Jeffrey;** Dean, School of Communications; [jeff@american.edu](mailto:jeff@american.edu); Communicated by email with him regarding his role as co-chair of President Burwell's Inclusion Committee. He has worked with OLLI in past.

**Snider, Nancy;** Director, Music Program; [nsnider@american.edu](mailto:nsnider@american.edu); interviewed about OLLI class she teaches for teacher perspective.

**Surls, Courtney;** VP of Development and Alumni Relations; [surls@american.edu](mailto:surls@american.edu); discussed issues of OLLI adding value to AU to which she agreed and was very positive. She seemed receptive to idea of AU acknowledging donations to OLLI. She is on the AU Strategic Planning Committee.

**Walrath, EmilyAnn;** Assistant Director, Student and Alumni Outreach Services, Office of Development and Alumni Relations; [alumniaudit@american.edu](mailto:alumniaudit@american.edu); discussed alumni audit and development.



---

## **APPENDIX: FINDINGS FROM BENCHMARKING OTHER OLLI'S**



---

# Fundraising Across OLLIs

---

- Raised \$25K from anniversary party. Now starting \$2M campaign to build out new space
- Raised \$300K from sponsorships and \$30-40K at the events/focused on planned giving. Raised “hundreds of thousands” (\$500,000 from one person). Leveraged cultural events, which would bring in speakers that were already at the University
- Started three years ago - \$46K in first year, then \$54K and now \$71K - 30-40% membership participation
- Annual Appeal, once per year
- Main sources are an annual fundraiser and some corporate sponsorships
- Annual fund campaign in the fall - a fundraising committee made up of members/gets some help from the members
- Acknowledgement of contributions in course catalogue and on poster board in member lounge



---

# National OLLI Data

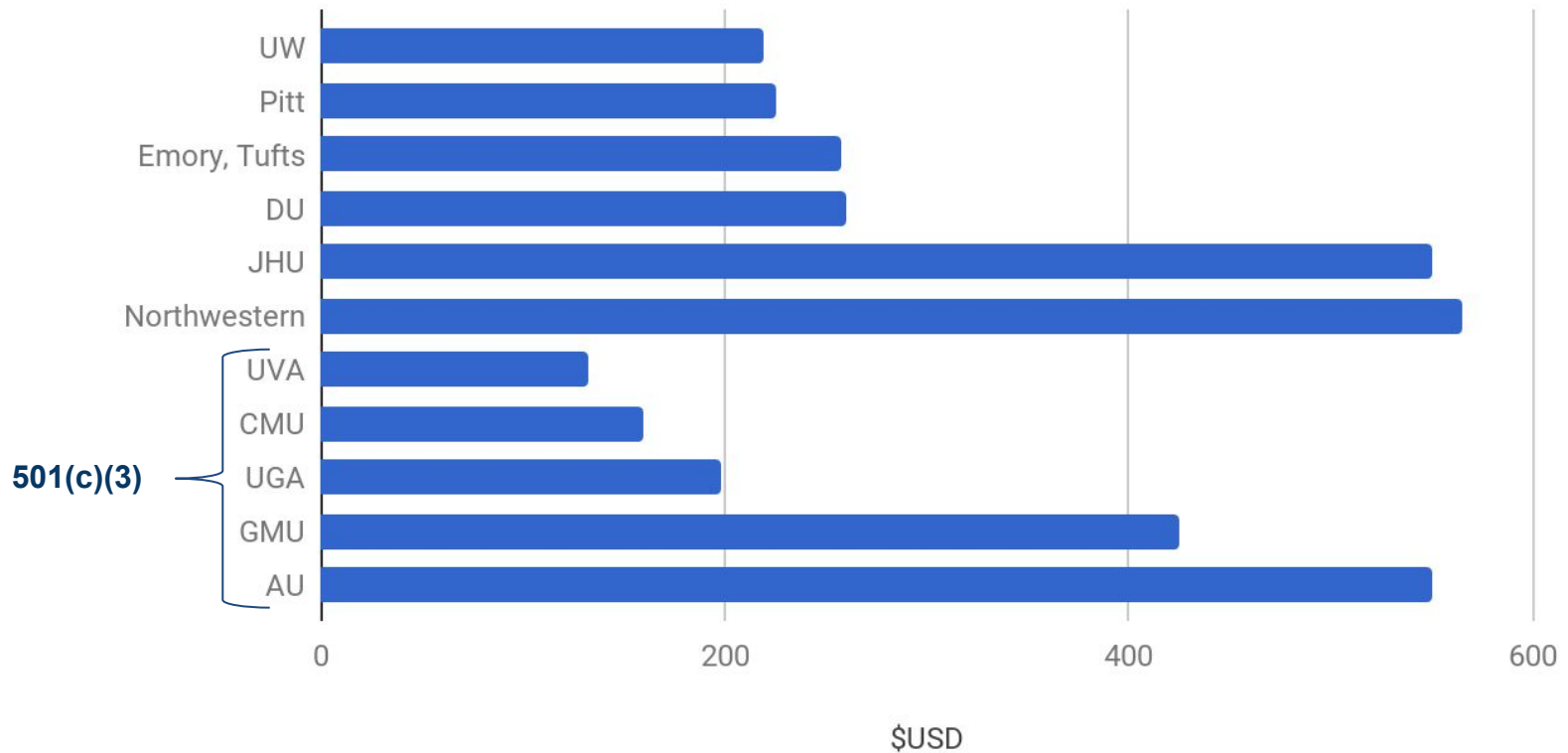
---

- The average OLLI membership is ~1200, with a high of 3000
- Board Committees:
  - Curriculum (95%), Leadership (85%), **Fundraising** (75%), Social/ Events (69%), Membership (67%), **Marketing** (61%), Volunteering (50%), **Finance** (48%), Travel (45%), **Technology** (27%), SIGs (20%), Diversity (19%)
- Membership Growth Projections:
  - 0-15% annually
- **Classroom location:**
  - $\frac{2}{3}$  hold classes in a mix between on and off-campus
  - $>\frac{1}{3}$  have classes in assisted living/ retirement communities (those that do are compensated by the community with space or funding)
- Teaching sessions span from 3-7 per year, with any breaks in schedule used as a registration period for the following session (**Months of Programming**)
- **~30% of classes are taught by University professors or graduate students**
  - **<20% of sites provide compensation to teachers**
- \$15,000-25,000 raised per year via fundraising from mostly small donors



# Membership Models

Assumed Revenue / Member (Annually)



\* Revenue calculated, using average of 4.6 classes per member, annually



---

## GEORGE MASON OLLI – 501(c)(3)

---

- 500 programs across three campuses
- 1<sup>st</sup> time Introductory rate of \$150 for one term for unlimited # of courses, and these members are carefully tracked
- Most staff is part-time or work-study students
- Have weekend and winter term classes
- All exit planning with University faculty includes exposure and invitation to OLLI
- Have a Finance and a Development Committee of the Board
- Acknowledgement of contributions in course catalogue and on poster board in member lounge
- Facebook presence to heighten awareness
- ¼ of classes taught by University faculty



---

## U. Virginia – 501(c)(3)

---

- Offer 165 courses in three counties
- Three full time and three part time employees
- OLLI Board which meets quarterly includes two appointees from Provost office and Board of Visitors
- U.Va. also acknowledges every donor gift to OLLI
- Sponsorship opportunities for inside cover of course catalogue
- Annual report on website





---

## Penn. State OLLI

---

- Fall, Winter, Spring and Summer classes
- Sponsorship for an Annual Founder's Lecture
- Gerontology Faculty on their advisory council
- Established OLLI speakers' bureau to speak at Rotary and other groups



---

# University of Washington OLLI

---

- Financially self-sufficient, gets NO state funding
- 1400 members in six locations (Seattle, Redmond, Mercer Island, Everett)  
(Two full-time and one part-time employee)
- Diversity goals met by going into target areas with the help of the Parks and Planning Commissions to get space
- Has Advisory Boards of community members to plan appropriate classes and other programs in each location
- Membership fee \$35 annually plus additional charge of \$30-45 per class
- Limited number of classes due to space constraints
- Teachers paid



---

# Johns Hopkins University OLLI

---

- Operates from three main locations (Rockville; Columbia; Baltimore) and two satellite locations, both adult living communities, Asbury and Ingleside. About 1000 members at three main locations
- Fall 2017 semester 9/12-12/7; spring 2018 semester 2/20-5/10
- Membership fee same as Olli-AU but Associate membership open to satellite locations where fewer courses are available (\$110-\$125 plus membership fee of \$50)
- Classroom space at Rockville and Columbia leased from JHU
- Five FTEs and two PT employees; Director reports to Dean of School of Arts and Sciences
- Free parking in outside lot starting to become scarce as it is shared
- Teachers paid
- Recently ran successful \$150,00 fundraising campaign
- They have been told by students, some of whom have attended Olli-AU, that they do not like lottery system. JHU does not have lottery system. Did not consider Olli-AU a competitor



---

# Duke University OLLI

---

- Fall, Winter, Spring classes - Sunday afternoon and one evening class
- Volunteer of the Year Award, Convocation events, Certificates of Appreciation to long-term instructors, luncheons for faculty
- Creating an opt-in member directory
- Pay all teachers \$400 honorarium but this has not produced Duke professor participation, but they have attracted graduate and post-doctorate faculty
- Aggressive tracking and reporting of all University interactions and invitations and establishing mentoring relationships and enrolling OLLI members in University studies

