



FORGING NEW DIRECTIONS 2025-2030 STRATEGIC PLAN



FORGING NEW DIRECTIONS OSHER LIFELONG LEARNING INSTITUTE AT AU 2025-2030 STRATEGIC PLAN

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INTRODUCTION

The Osher Lifelong Learning Institute at American University (OLLI at AU) is a non-profit organization affiliated with American University that provides courses, lectures, field trips, social and other activities for a community of approximately 1600 seasoned and active learners age 50+. Each year we offer approximately 275 college-level courses covering a broad range of subjects – current events, history, government, literature, economics, philosophy and religion, languages, arts and music, and science and technology. These are non-credit, no-exam courses with no prerequisites – **learning for the love of learning**. Our classes, which draw from the rich and varied backgrounds, interests, experience, and expertise of our capital-area members, are peer-taught. Courses are presented in both in-person and online formats. We are located at 4801 Massachusetts Avenue, which is in the Spring Valley section of the AU campus. We were founded in 1982 and have been in continuous operation for 42 years.

OLLI at AU is part of the Osher Lifelong Learning Institute's network of 124 OLLIs around the country, all of which are affiliated with colleges or universities. There is at least one in each state and three in the Washington DC area (American, George Mason, and Johns Hopkins). Individual OLLI programs across the country vary considerably in their offerings and membership.

OLLI at AU thrives on an active volunteer culture. Although we have a small staff of professionals to manage day-to-day operations, most activities depend on volunteer committees (curriculum, lectures, membership, social, finance, development, and strategic planning) and, most importantly, on members who conduct courses as Study Group Leaders. These creative and knowledgeable leaders are at the heart of our program and each year present OLLI participants with a rich array of both new and updated courses and activities. This focus on the quality and diversity of our offerings is responsible for our growth as a leading participant in the field of adult education.

At approximately five-year intervals, the OLLI at AU Board of Directors has sought to evaluate present operations and project annual needs of the organization over a longer timeframe. The plan preceding this one focused on the period in which we moved from numerous satellite spaces (mostly in local churches) to our own classrooms and office facilities in the American University Spring Valley Building. Naturally, that five-year plan (2018-2023) focused heavily on the challenges and opportunities for expansion presented by having a 10-year lease on six dedicated classrooms, a large auditorium, on-site parking, and adequate office space for our staff. Most goals outlined in that plan have been achieved. Our Executive Director, Tony Long, outlines our successes below.

STRATEGIC CHALLENGES & ACCOMPLISHMENTS

2020-2024

BY TONY LONG, EXECUTIVE DIRECTOR
OSHER LIFELONG LEARNING INSTITUTE AT AU
WASHINGTON, DC

Strategic planning is a forward-looking process, but it is based on achievements that previous plans and their implementation have realized. The OLLI at AU Strategic Plan of 2018 to 2023 was primarily designed to assist us in capitalizing on the transition from an organization scattered over many locations to the more established setting of our new home on 4801 Massachusetts Avenue and to make other operational adjustments to improve our programs.

Most of those goals have been achieved – our relationship to American University has never been stronger and is foundational to our success moving forward. Our physical plant has been dramatically improved and comfortably supports our 1600 members with over 275 courses annually, dozens of expert-provided lectures, and many social events throughout the year. The financial underpinnings of OLLI at AU have been augmented with new contribution programs and expanded course offerings, and we are on a sound financial footing.

But strategic planning cannot always predict the future, and the years covered by the previous plan could never have predicted the challenges we faced from the Covid-19 pandemic. During those early months of uncertainty in Spring 2020, many organizations stalled or failed, but OLLI proved to be an adaptable, innovative, and resilient organization.

The OLLI Board acted decisively and moved the program online within one week for the remainder of Spring 2020—everyone learned Zoom; instructors adapted their course-delivery plans; volunteers stepped in to assist technology-challenged teachers; and members took a leap of faith and stuck with us. OLLI thrived online for the next 18 months with a tremendous amount of work and OLLI community support. In Fall 2021, while continuing online courses, we returned to limited in-person classes. And since 2022, we have offered a full complement of both in-person and online classes.

We could not have known in those early pandemic days, but our need to adapt spurred OLLI to expand its reach and become an even more impactful organization. We are no longer bound by classroom space or even geography. We can reach more diverse populations and provide online courses to those with accessibility issues. We can further support our volunteer instructors in new and creative ways. We can hold large-capacity lectures online, record classes, and maintain a digital library. These program features and benefits that are embedded parts of our program today weren't even considered several years ago.

I am excited about the opportunities ahead for the next five years. The vision set forth in this strategic plan serves as the roadmap for OLLI to continue thriving as a healthy, vibrant community of lifelong learners.

OLLI AT AU STRATEGIC PLAN 2025-2030

INTRODUCTION

As indicated above, OLLI at AU has undergone substantial changes in the past five years due in large part to Covid, which impacted almost every aspect of the organization ranging from membership growth to the creation and expansion of online study groups. Due to strong leadership throughout this demanding period, OLLI is now experiencing significant growth in membership and program offerings. Capitalizing on this growth and addressing new opportunities and challenges require a re-evaluation of our programs and activities in the post-Covid environment. Methods and preferences in teaching and learning have changed dramatically and determining the most effective and student-friendly modalities and content will be critical into the future. In addition, expanding our work in community building and strengthening our financial base will also be of paramount importance. Our mission, however, has not and will not change:

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 new strategic planning process was launched by the Board of Directors in the summer of 2024 with the appointment of a small committee composed of both long and shorter-term OLLI members. Central to the strategic planning process was the need to have extensive input from OLLI's elected leadership, professional staff, and all six of the OLLI volunteer committees. Committee members were asked to identify their major goals and to discuss the feasibility of various implementation steps in open meetings with the strategic planning group. In addition, the group reviewed recent member satisfaction and preference surveys, information on issues being addressed at other OLLIs around the country, and other data related to finances, fundraising, and demographics. These all significantly informed the strategic plan. Over the next five years, in consultation with OLLI leadership, it will be up to the appropriate committees and OLLI staff to prioritize the proposed strategies, design action plans, and develop timelines for their achievement. It is understood that these plans will require periodic monitoring and modification over the course of the next five years based on experience and evolving circumstances.

STRATEGIC ISSUES

The strategic plan described below is structured around five over-arching goals in the areas of membership maintenance and growth, program development and expansion, community building, fundraising, and financial management (see a full list in Appendix A). Each goal is followed by proposed implementation strategies with the understanding that experience and events over the next five years may make them more or less feasible and/or effective.

MEMBERSHIP MAINTENANCE & GROWTH

Goal

Continue to welcome a diversified membership of lifelong learners through targeted programs and outreach activities best suited to stimulate positive levels of retention and growth.

Implementation Strategy

1. In consultation with leadership, set an annual membership growth goal within a range of 3% to 5%.
2. Create greater visibility for OLLI through
 - presentations and short courses throughout the greater Washington area with emphasis on the Villages in DC, senior living residences, other residences with a high number of seniors, clubs, houses of worship, and other venues, including those underserved by OLLI programs;
 - strategic relationships with AARP and other senior-focused organizations;
 - enhanced print/media advertising, including paid advertising in local university alumni publications and senior living center newsletters;
 - development of video testimonials and podcasts by leading SGLs; and
 - marketing online classes in areas where there are no OLLIs.
3. Further evaluate the lifestyle and evolving preferences of OLLI members and coordinate with the Curriculum Committee to calibrate a balance of in-person and online study groups to meet the needs of our present and anticipated participants.
4. Evaluate opportunities for membership expansion through outreach to government agency personnel, particularly those experiencing increased rates of retirement and determine how best to reach these individuals. Recruit OLLI members with knowledge of such agencies to

assist in this effort.

5. Continue to encourage and remind all OLLI at AU members to serve as ambassadors for the program, asking them to identify opportunities to create awareness of OLLI classes through their own personal networks of friends, clubs, book groups, organizations, etc. Prepare a variety of easily accessible and simple off-the-shelf membership briefing packets and concise talking points for use by members as needed.
6. Maximize outreach to AU Emeriti faculty, staff, and alumni to grow membership and recruit SGLs.
7. Consider new incentives to grow and retain membership.

Background

Ensuring strong and sustained member growth is pivotal to the long-term future and success of OLLI at AU. Membership satisfaction, retention, and expansion are the backbone of the organization and its programs. Fortunately, based on a comprehensive 2023-member survey, OLLI at AU enjoys a member satisfaction rate of almost 90%. More than 60% of members consider OLLI to be very important to their overall satisfaction in life. In addition, OLLI at AU, unlike many similar organizations, has emerged from the Covid period with record membership as well as an unprecedented number of volunteer-led study group offerings of outstanding quality. Building on this growth and exploring new opportunities for member recruitment and retention will be critical to the success of the 2025-2030 strategic plan.

Growth in volunteer education programs such as OLLI's is a complex issue under constant evaluation by OLLIs across the country. As there is a natural attrition rate both in the number of active members and study group leaders, OLLI must constantly recruit to both maintain and expand its programs. As costs for space, staff, and program activities continue to grow and funds are derived primarily from membership fees which now cover approximately 70% of the organization's revenue, the issue of maintaining and expanding membership is appropriately a primary focus of this strategic plan.

Member Retention: Enhancing Member Value

Survey data overwhelmingly confirm that OLLI's greatest asset is its focus on lifelong learning. Members are provided with a rich array of superb study groups on a wide variety of subjects, along with weekly lectures by prominent experts and authors on many diverse topics. In addition to the intellectual stimulation, many members also seek a network of others who share this love of learning. Providing new opportunities to network and share experiences will enhance member value (see Community Building section below).

At present, OLLI at AU enjoys a low annual attrition rate of 15% compared to other OLLIs (averaging 22% across the country with some as high as 65% during Covid). According to the 2023-member survey, the major reasons for not renewing year-over-year included scheduling conflicts, travel, illness, and an insufficient number of online classes. The primary reason given was due to scheduling conflicts. The recording of in-person classes began in 2023 after a successful pilot project and has at least partially addressed the scheduling conflicts issue. Expanding the number of online classes and continuing to provide class recordings should help to address this problem and improve member satisfaction and retention.

Another issue raised through the planning process was the concept of the “life cycle” of the OLLI member. At what stage do people generally join OLLI? How does their lifestyle (need for greater flexibility due to age, travel, medical issues, etc.) impact member access and satisfaction? How can OLLI at AU better calibrate the modality of study groups to reflect these important issues? Addressing these concerns will require coordination between the Membership and Curriculum Committees. Focus groups may be helpful in deepening our understanding of these issues.

Member Recruitment

There are currently some excellent member recruitment activities underway, driven in large part by the highly engaged Membership Committee. In addition, members of that committee and others have suggested some new opportunities to create greater visibility. These include presentations to various audiences of OLLI’s targeted demographic, new strategic relationships with AARP and other senior-focused organizations and expanding outreach to local libraries through information sessions. There is also keen interest in tapping potential members in areas underserved by OLLI at AU programs.

One area that is ripe for cultivation is an anticipated surge in retirements from government agencies. Many large agencies conduct periodic retirement seminars that, among other things, focus on opportunities for interesting learning options after leaving government service. Others have associations of and websites for retired employees that also focus on the adult education area. OLLI’s location in Washington DC makes it likely that many of our members will have contact with these activities. It has been suggested that OLLI identify members with ties to selected federal agencies to develop a plan for outreach through information fairs as well as human resource and other appropriate offices. Some initial work is already underway in this area and should be expanded.

It has also been suggested that OLLI consider developing a brief presentation about the value of lifelong learning, integrating testimonials from OLLI members. This could be used in a number

of settings as a recruitment tool as well as assisting with member retention.

In addition, there have been several suggestions for new marketing tools such as the development of videos featuring study group leaders who could provide a sampling of OLLI classes and podcasts by selected SGLs. These could be used in presentations and placed on the website as examples of OLLI's sophisticated level of adult education. The Member Benefits section on the website could also be expanded to include testimonials and information on the value of lifelong learning for good health. With the growth of online courses, outreach to areas where there are no competing OLLI courses should be considered.

While some of the above activities are underway, it would be helpful to develop a two-year outreach plan, setting some goals and leveraging member relationships. This plan could be modified on an ongoing basis, capitalizing on new opportunities. In light of the limited number of OLLI staff, most of the above activities would have to be member-driven. Enlisting the assistance of members outside of the Membership Committee and forming small working groups would help ease the workload and stimulate new volunteer opportunities.

Because membership recruitment and retention are critical to OLLI's success across all parts of the program, there may need to be more frequent coordination among the committees on this topic. Excellent suggestions on membership issues were made relating to the work of other committees. To ensure greater coordination, the OLLI Board may wish to consider creating planned opportunities once or twice a year for the committee chairs to meet to discuss progress, challenges, overlap, and ways to assist in meeting membership goals. It is recommended that the Strategic Planning Committee be responsible for convening these meetings and use this opportunity to track progress on the strategic plan.

PROGRAM DEVELOPMENT AND EXPANSION

Goal

Continue to expand the college-like learning experience that has proved so successful in the past while broadening and strengthening the academic program to meet the needs of a growing and diverse membership. Provide expanded support for new and veteran study group leaders (SGLs) across all teaching modalities to ensure top-quality courses are available for the broad interests of OLLI at AU members.

Implementation Strategy

1. SGL recruitment – Increase efforts to recruit new study group leaders from within and outside the OLLI community and within the DC area and beyond.
2. SGL training – Continue to enhance study group leader preparation with training for best practices in teaching older adults and in using tools such as PowerPoint, Zoom, etc.
3. Course quality control – Continue to review real-time course assessment data, including initial class enrollment, attendance data, and mid-class member feedback. If possible, continue to provide mentorship to SGLs to address problems and issues as they occur.
4. Curriculum committee management – Ensure that the committee is structured and staffed to meet the needs of a twelve-month academic calendar covering over 275 courses each year. Consider the need for committee member expansion in light of this course expansion.
5. Subject area coverage and cross-OLLI course sharing – Determine interest on the part of other OLLI programs around the country in developing a “course exchange” pilot program to aid in expanding our offerings, fill holes in our program, and empower our SGLs to teach to a broader audience.
6. Modality evaluation – Continue to encourage a demand-related mix of in-person, online and hybrid classes based on membership feedback and participation statistics.
7. Program evaluation – Design and initiate a standardized survey consisting of no more than 10 questions to be sent to all OLLI members annually to track the evolution of membership satisfaction and preferences on key areas over time.

Background

All OLLI classes are developed and taught by OLLI members. Preparation for each session begins with an open invitation to potential and present study group leaders to propose eight-to-ten-week courses on almost any subject that interests them enough to do the substantial work that is necessary to create and deliver such a class. OLLI at AU receives over 275 such proposals each year. A dedicated Curriculum Committee of some 20 members seeks new SGLs in their particular area of expertise, reviews all proposals submitted, interacts with individual teachers to clarify and scope out courses, and submits their recommendations to the full committee which either recommends their inclusion or rejection. Recommended classes are sent to the Board of Directors for final approval. The growth of the program to over 100 courses per semester, and particularly the degree to which it has recovered from the Covid period of disruption, attest to the success of this methodology and the dedicated volunteers who make it possible.

Because this system has worked so well throughout the history of OLLI at AU, no one who participated in the development of this strategy suggested that any major changes to it are necessary. The recommendations that follow should be viewed primarily as suggestions aimed

at expanding the effectiveness and scope of OLLI's response to the modern challenges that all programs of this type face in an evolving learning environment. In particular, the first four recommendations are core functions of the Curriculum Committee and simply emphasize the criticality of maintaining these activities with a few suggestions for expansion.

Study Group Leader Recruitment

OLLI continues to be showered with dozens of course proposals each time a solicitation is announced, but there is always concern that the significant challenges of course design and presentation, along with the eight-to-ten-week time commitment to teach the class, will prove to be daunting to many potential study group leaders. The committee has recently begun to allow classes of four weeks or more in order to encourage participation and this modification appears to be bearing fruit. Another suggestion for recruiting new SGLs is to have periodic workshops open to anyone thinking about developing a class prior to submitting a proposal. These could feature veteran teachers discussing varying modes of course delivery – from conducting purely discussion groups to presenting content-heavy, information transfer classes; the challenges of engaging extremely bright, highly credentialed seniors; and the tradeoffs between online versus in-class teaching. In order to expand the pool of SGLs, particularly in specific areas of study, it was suggested that we reach out to retiring American University faculty. A multiyear plan for strategic recruitment of SGLs should be considered. In addition to reviewing course proposals, OLLI staff and committee members should seek to recruit SGLs consistent with the needs identified through regular review of subject matter coverage.

Study Group Leader Training

Another concern for some potential teachers is their lack of formal teaching experience, particularly to an audience of senior learners. Experienced teachers, on the other hand, may find it difficult to adjust their teaching style to a group of learners who are not seeking a degree and will not write papers or necessarily read vast amounts of assigned materials. Regardless of previous teaching experience, all new OLLI SGLs need to be acclimated to the senior learning environment. This is frequently supplied by simply recommending that members interested in developing a course attend several OLLI courses – particularly in the subject-matter area that they wish to pursue. In addition, experienced SGLs are sometimes enlisted to meet with new teachers and may even mentor the new person after the class begins. Formal training sessions for new SGLs are also held at the beginning of each semester to assist them in understanding the technical aspects of either in-class or online teaching. Suggestions have been made that the Curriculum Committee form a small working group of experienced members to supplement these pre-semester classes with more specific instructional advice. All of these activities would benefit from expansion to the extent possible in a volunteer-led program.

Course Quality Control

Once the catalog is finalized, members sign up for classes and the semester begins. An immediate indicator of the popularity of a course is the number of members who seek admission. The OLLI staff and appropriate Curriculum Committee members track attendance and monitor any complaints by students ranging from the room temperature to disapproval of the SGL for any number of reasons. The mid-course evaluation – usually requested after the second week of classes – is the formal process for evaluating “how things are going” and appropriate Curriculum Committee members read these with interest. Most evaluations are affirming. Some raise minor issues that can be readily addressed through a conversation with the SGL, but others are more problematic. Veteran members of the committee generally consult the committee chair or professional staff with difficult issues. It was suggested that a standardized process be established so there is uniformity in the way committee members provide feedback to SGLs.

Curriculum Committee Management

There are two Curriculum Committees – one that focuses on the Fall, Spring and February courses; and the other that focuses on June and July courses. The committees are organized by subject matter groups – OLLI volunteers who have expertise in specific areas, each led by a chief coordinator. The committees also have the support of a full-time OLLI staff member devoted to working with the group to ensure course proposals reach appropriate committee reviewers in a timely manner and smoothly move through the approval process. This is both a complex bookkeeping process and a sometimes-intense human interaction challenge. After courses have been selected, committee members continue to monitor the classes within their area of responsibility and to handle any issues that come up throughout the semester. Hundreds of hours are devoted to this core OLLI function. Ensuring that the committees are structured and staffed to meet the needs of a twelve-month academic calendar covering over 275 courses each year is, and will remain, a significant management challenge. Suggestions have been made that the committees may need expansion in light of the increased number of classes that OLLI is now accepting.

Subject Matter Coverage

Because all classes are designed by participants, the mix of subject matter changes each semester. Some years there are numerous classes in literature and few in art. Some years World War II has several classes, and the Civil War has none (and vice versa). This is normal and changes usually evolve over time. Occasionally, however, there can be serious gaps that need addressing, such as a dearth of art history or Spanish language classes, that can persist. This strategic plan suggests an innovative, cross-OLLI cooperation pilot program made possible by the recent expansion to online teaching. OLLI at AU's Executive Director has extensive contact with the national OLLI program and is exploring a pilot program with several high-performing OLLIs at universities across the country. It is assumed that, because this is an exchange, no budgetary impact would occur for either party to the exchange. We recommend that he focus this project

on subject areas and topics that we do not presently have access to or need to expand. Since all OLLIs are different, we suggest that several of these exchanges be piloted for a few years before the Board decides on the efficacy of this model.

Modality Evaluation

Perhaps no issue is newer or more consequential than the one raised by the Covid 19 experience of the last few years – the offering of online classes. As the Executive Director explained above, our almost overnight conversion of a 100% in-class program to a 100% online program and the ability to utilize that technology to maintain our membership throughout the pandemic period was impressive. It also opened the door to new thinking about our modes of teaching now that the health crisis is over. In our last full semester – Fall 2024 - ~50% of our members had returned to solely in-class selections and 15% chose only online courses, but a full 35% were taking a mix. Following the lead of our members, almost one third (38 of the record 112 courses offered) are available online in the spring semester of 2025. In general, members are quite comfortable with both modes of learning and appear to select their classes based on content, not the mode of delivery. Some, of course, are limited to online courses due to health, family or travel issues and depend on this modality since they could not participate without it. It is also true that competing educational organizations are almost all offering online classes and to remain competitive, we must do so as well. The challenge is how to maintain an appropriate and effective mix – providing outstanding courses online while maintaining a vibrant, in-person community of learners. Many people had hoped that hybrid classes would provide the answer, but while some SGLs are comfortable with this method, many are not and wish to teach only in person or online. Offering training in the delivery of hybrid courses should be considered.

During the strategic planning process, many OLLI members acknowledged that the appropriate balance of course modality would have to emerge from the preferences of the membership since both the providers of our classes, the SGLs, and the users, our members, are free to choose their courses as they wish. Some wanted to set a specific online goal in the range of 30 to 50 percent to broaden our membership. The natural emergence of approximately one-third of all classes being online this semester seems to be addressing the issue without establishing a specific goal at this time. Both the Curriculum Committee and the Board will have to monitor the issue closely over the next five years to assure that OLLI continues to serve all preferences and meets the membership goals set forth in this plan.

Program Evaluation

Most programs serving the public create standardized feedback loops through which they track the satisfaction and identification of problems in their activities. In order to evaluate the effectiveness of the OLLI program over time, a standardized, annual survey should be designed and sent to all members, whether they take courses in a given year or not. It should be brief - consisting of no more than 10 questions – and designed to track the evolution of OLLI

membership satisfaction. A standardized feedback loop over the course of this five-year period would allow us to identify problems and determine the efficacy of implemented solutions to those problems. It could also provide information on the achievement of the specifically recommended goals of addressing gaps in our curriculum and satisfaction with our mix of in-person and online course selections.

COMMUNITY BUILDING

Goal

Welcome newcomers to OLLI and strengthen bonds among present members through expanded opportunities for community socializing and interaction.

Implementation Strategy

1. Continue to maintain and expand opportunities for OLLI-generated social interactions such as: social space events, member appreciation activities, holiday parties, happy hours, and the ongoing community “welcomers” function which welcomes new members and assists them in navigating entrance into the OLLI program.
2. Explore opportunities for members to share their interests and activities (e.g., book and movie groups, travel discussions, informal clubs, etc.) with other OLLI members either in person or online.
3. Encourage members to spread the word about OLLI at community activities such as local street fairs, block parties and other gatherings.
4. Continue to expand existing, and develop new, opportunities for day trips to interesting sites in and around Washington, DC.

Background

While most members of OLLI are primarily interested in the intellectual stimulation provided by the courses presented each semester, others are also hoping to interact with people who share their interests and perhaps to expand their acquaintances over time. The move to our dedicated space on Massachusetts Avenue has allowed us to expand opportunities for this kind of interaction between classes in our designated social space when classes are in session and to hold larger events (holiday parties, for example) in the spacious 6th floor gathering room. Social events such as “happy hours” are also held several times a year at restaurants across the street. These activities should be continued and expanded if volunteers are available. In addition, the plan strongly endorses the ongoing “Welcomers” program. To introduce new members to OLLI, a core of dedicated volunteers has been active for some years. Welcomers contact new members

at the start of the semester, provide basic information on OLLI, call attention to upcoming events, and serve as a resource. Welcomers are asked to touch base with the new members a few times during the semester.

Several people suggested that we continue to explore opportunities for members to share interests and activities (e.g., book and movie groups, travel discussions, informal clubs, etc.) with other OLLI members either in-person or online. Before Covid 19, OLLI members were involved in OLLI Ops, member-led groups that scheduled and managed their own meet-ups around a particular subject or interest. This past year, OLLI Ops became OLLI Clubs, which created a lunch group for members. Occasionally, adding an informal 'meet-ups' section to the Friday newsletter might also be considered if volunteers are available. This would provide additional opportunities for social interaction among members who share a common interest. Adding a social events page to the widely distributed, semi-annual catalogs listing pre-planned social events could be quite effective since these catalogs are usually retained and frequently consulted by members. It was also suggested that we explore the feasibility of offering online opportunities for social interaction primarily focused on the portion of our membership who may not be mobile enough to attend events on campus.

While these types of activities may be feasible, there is concern that this is somewhat beyond our scope as a learning institution and would require significant volunteer commitment. Indeed, a major constraint in expanding all activities of this type is the need for volunteer leadership because the staff is small and largely dedicated to program-related activities. We continue to have excellent leadership for these aspects of OLLI, but any plans to expand them must be realistic in terms of the availability of volunteers.

Finally, several members suggested that OLLI explore expanded opportunities for day trips to the many interesting historic and artistic locations around the Washington area. While we have had such activities in the past – many as a part of an OLLI course - they were discontinued during Covid and have only recently been resumed. We suggest that this type of activity should be encouraged and expanded, as appropriate, in both class-related trips and as separate activities led by volunteers with the approval and coordination of OLLI staff.

FUNDRAISING

Goal

Strengthen and expand the culture of giving that supports OLLI at AU programs, augments participation in the established annual giving program, as well as the OLLI at AU Legacy Society, and explore opportunities for new funding sources, such as corporate sponsors.

Implementation Strategy

1. Determine effective measures to capture and express member satisfaction in order to increase annual member giving to 30% over time.
2. Engage OLLI member experts in estate law to assist in promoting and expanding the effectiveness of the OLLI at AU Legacy program with emphasis on identifying and encouraging participation of members who have not yet made a planned gift.
3. Create a working group of appropriate OLLI members to design, pilot, and evaluate a corporate sponsorship approach to targeted groups (law firms, retail and other business sectors, etc.).
4. Continue to ensure that all fundraising approaches within OLLI avoid solicitation overlap with other fund-raising activities.

Background

As with most nonprofit organizations, OLLI depends on charitable giving to ensure its health and sustainability while maintaining affordable participation costs for its members. While the major share of OLLI revenue is derived from member fees, there is an ongoing need to cover the gap between these fees and program expenses. A major portion of that gap is filled by charitable giving from our members. While the Board, in consultation with the Executive Director, will be responsible for determining the fundraising goal each year based on the needs of the budget, this plan calls for an annual participation goal of 30% in membership giving over time.

During 2023, approximately 26% of members donated funds beyond their membership fees. While this is a significant increase from the past, given the high member satisfaction rate in recent surveys, there appears to be room to increase this percentage. A number of ideas were raised during the planning process, such as expanding match challenges as well as better educating the members on why their charitable support is central to strengthening and growing our program. Developing talking points for the Board and Committee members about OLLI's key areas of need and how fundraising contributions could help address these should be considered by the Development Committee and recommended to the Board. Several

participants in the strategic planning process emphasized the importance of remaining sensitive to not overwhelming OLLI members with overlapping or too frequent fundraising solicitations.

In 2022, in celebration of OLLI's 40th anniversary, the OLLI at AU Legacy Society was created to encourage members to include OLLI bequests in their estate planning. For the first time, planned gifts became an additional focus of fundraising. Sharing information about the OLLI at AU Legacy Society is critical to its growth. Within the past few years, some members have included OLLI in their estate planning but were unaware of the Legacy Society. In addition, since the majority of OLLI members have wills, encouraging them to consider a planned gift when revising their estate plans should be suggested. Finally, since the majority of those most likely to participate in the OLLI at AU Legacy Society are long-term members, a customized letter to that subset should be considered.

In light of the need to further diversify OLLI's revenue streams, this strategy calls for the development of a plan to explore raising funds from the business community. The plan should include the design of a corporate sponsorship program, with strategic outreach to local businesses, law firms, and other corporations with ties to OLLI members. This pilot program will require the creation of a working group that includes OLLI members with ties to targeted commercial groups. In addition, the success of the program would require an awareness campaign to familiarize members with this new initiative and enlist their assistance with outreach.

To ensure broader success of the fundraising effort, it will be important for the Development Committee to coordinate with activities of the Membership and Curriculum Committees.

FINANCIAL MANAGEMENT

Goal

Ensure long-term financial stability that keeps pace with a growing membership, supports academic program needs and community development, and operates with efficiency and transparency.

Implementation Strategy

1. Continue to provide coordination between Development Committee fundraising activities, Financial Committee tracking functions, and appropriate staff activities to ensure accurate and

clear reporting of all financial matters to the OLLI Board and to OLLI members.

2. Continue to conduct and report quarterly reviews of participation activities (number of classes, members, and other functions), financial and budget status, and American University interface issues (space, parking, repairs, etc.) that impact financial status and operational policy.
3. Conduct and report annual reviews of membership growth and attrition, financial income and expenditures, investment portfolio strategies and statements, and any other financial issues that may impact the long-term growth and stability of OLLI at AU.
4. Evaluate and adjust staff responsibilities and skills to improve and optimize functionality of management, tracking and communication activities.
5. Develop improved communication tools to inform the membership of financial activities and status at appropriate opportunities such as the Annual Meeting.

Background

Sound financial management is crucial for any organization to achieve its mission effectively and sustainably. Proper budgeting, transparent financial reporting, and strategic planning ensure that OLLI resources are used responsibly and for the benefit of the community.

OLLI's annual budget is proposed by the Executive Director and Finance Committee and approved by the Board of Directors. Funding streams come from three main sources: membership fees, donations, and distributions from the Osher Foundation grant. When necessary, OLLI uses its reserve fund to draw up to 5% annually to supplement any budget shortfall. With guidance from our investment advisor at Morgan Stanley, the Finance Committee, and the Board review our reserve fund investments annually to ensure maximum return and proper allocation of funds. OLLI maintains a lean budget, yet the typical cost centers that any organization has—professional staff and benefits, rent, technology, and outside services—have predictably grown over the years. As expenses have occasionally outpaced revenue, we have rarely had to increase membership fees. Indeed, the recent 10% increase in the Fall of 2024 is the first increase since 2017. Significantly, we explained this change to our membership in advance, received not a single complaint when it was put in place, and membership actually increased.

OLLI is transparent in reporting its financial condition by posting the annual budget online, conducting regular audits, and maintaining a very close working relationship among the Executive Director, Treasurer, Finance Committee, and the Board of Directors on finance-related matters.

It is the strength of OLLI staff management and Finance Committee and Board of Directors' oversight that have ensured OLLI's financial footing is strong and able to weather unforeseen circumstances, like the Covid challenge, and to expand our program responsibly for the benefit of its members.

As with many of our other strategic planning goals, the recommended actions for financial management above are already largely in place and do not require substantial changes. The implementation steps are self-explanatory, focusing primarily on increased coordination and communication with and among all parts of the OLLI membership, volunteer, and professional staff. These good management practices are at the heart of any successful organization but do require the periodic and timely monitoring that a strategic planning process imposes.

APPENDIX A: LIST OF GOALS AND IMPLEMENTATION STRATEGIES FOR 2025-2030

MEMBERSHIP MAINTENANCE AND GROWTH

Goal

Continue to welcome a diversified membership of lifelong learners through targeted programs and outreach activities best suited to stimulate positive levels of retention and growth.

Implementation Strategy

1. In consultation with leadership, set an annual membership growth goal within a range of 3% to 5%.
2. Create greater visibility for OLLI through 1) presentations/short courses throughout the greater Washington area with emphasis on the Villages in DC, senior living residences, other residences with a high number of seniors, clubs, houses of worship, and other venues, including those underserved by OLLI programs; 2) strategic relationships with AARP and other senior-focused organizations; 3) enhanced print/media advertising, including paid advertising in local university alumni publications and/or senior living center newsletters; 4) development of video testimonials and podcasts by leading SGLs; and 5) marketing online classes in areas where there are no OLLIs.
3. Further evaluate the lifestyle and evolving preferences of OLLI members and coordinate with the Curriculum Committee to calibrate a balance of in-person and online study groups to meet the needs of our present and anticipated participants.
4. Evaluate opportunities for membership expansion through outreach to government agency personnel, particularly those experiencing increased rates of retirement and determine how best to reach these individuals. Recruit OLLI members with knowledge of such agencies to assist in this effort.
5. Continue to encourage and remind all OLLI at AU members to serve as ambassadors for the program, asking them to identify opportunities to create awareness of OLLI classes through their own personal networks of friends, clubs, book groups, organizations, etc. Prepare a variety of easily accessible and simple off-the-shelf membership briefing packets and concise talking points for use by members as needed.
6. Maximize outreach to AU Emeriti faculty, staff, and alumni to grow membership and recruit SGLs.
7. Consider new incentives to grow and retain membership.

PROGRAM DEVELOPMENT AND EXPANSION

Goal

Continue to expand the college-like learning experience that has proved so successful in the past while broadening and strengthening the academic program to meet the needs of a growing and diverse membership. Provide expanded support for new and veteran Study Group Leaders (SGLs) across all teaching modalities to ensure top quality courses are available for the broad interests of OLLI at AU members.

Implementation Strategy

1. SGL recruitment – Increase efforts to recruit new study group leaders from within and outside the OLLI community and within the DC area and beyond.
2. SGL training – Continue to enhance study group leader preparation with training for best practices in teaching older adults and in using new tools such as PowerPoint, Zoom, etc.
3. Course quality control – Continue to review real-time course assessment data, including initial class enrollment, attendance data, and mid-class member feedback. If possible, continue to provide mentorship to SGLs to address problems and issues as they occur.
4. Curriculum committee management – Ensure that the committee is structured and staffed to meet the needs of a twelve-month academic calendar covering over 275 courses each year. Consider the need for committee member expansion in light of this course expansion.
5. Subject area coverage and cross-OLLI course sharing – Determine interest on the part of other OLLI programs around the country in developing a “course exchange” pilot program to aid in expanding our offerings, fill holes in our program, and empower our SGLs to teach to a broader audience.
6. Modality evaluation – Continue to encourage a demand-related mix of in-person, online and hybrid classes based on membership feedback and participation statistics.
7. Program evaluation – Design and initiate a standardized survey consisting of no more than 10 questions to be sent to all OLLI members annually to track the evolution of membership satisfaction and preferences on key subject areas over time.

COMMUNITY BUILDING

Goal

Welcome newcomers to OLLI and strengthen bonds among present members through expanded opportunities for community socializing and interaction.

Implementation Strategy

1. Continue to maintain and expand opportunities for OLLI-generated social interactions such as: social space events, member appreciation activities, holiday parties, happy hours, and the ongoing community “welcomers” function which welcomes new members and assists them in navigating entrance into the OLLI program.
2. Explore opportunities for members to share their interests and activities (e.g., book and movie groups, travel discussions, informal clubs, etc.) with other OLLI members either in person or online.
3. Encourage members to spread the word about OLLI at community activities such as local street fairs, block parties and other gatherings.
4. Continue to expand existing, and develop new, opportunities for day trips to interesting sites in and around Washington, DC.

FUNDRAISING

Goal

Strengthen and expand the culture of giving that supports OLLI at AU programs, augments participation in the established annual giving program as well as the OLLI at AU Legacy Society, and explore opportunities for new funding sources, such as corporate sponsors.

Implementation Strategy

1. Determine effective measures to capture and express member satisfaction in order to increase annual member giving to 30% over time.
2. Engage OLLI member experts in estate law to assist in promoting and expanding the effectiveness of the OLLI at AU Legacy program with emphasis on identifying and encouraging participation of members who have not yet made a planned gift.

3. Create a working group of appropriate OLLI members to design, pilot, and evaluate a corporate sponsorship approach to targeted groups (law firms, retail and other business sectors, etc.).
4. Continue to ensure that all fundraising approaches within OLLI avoid solicitation overlap with other fundraising activities.

FINANCIAL MANAGEMENT

Goal

Ensure long term financial stability that keeps pace with a growing membership, supports academic program needs and community development, and operates with efficiency and transparency.

Implementation Strategy

1. Continue to provide coordination between Development Committee fundraising activities, Financial Committee tracking functions, and appropriate staff activities to ensure accurate and clear reporting of all financial matters to the OLLI Board and to OLLI members.
2. Continue to conduct and report quarterly reviews of participation activities (number of classes, members, and other functions), financial and budget status, and American University interface issues (space, parking, repairs, etc.) that impact financial status and operational policy.
3. Conduct and report annual reviews of membership growth and attrition, financial income and expenditures, investment portfolio strategies and statements, and any other financial issues that may impact the long-term growth and stability of OLLI at AU.
4. Evaluate and adjust staff responsibilities and skills to improve and optimize functionality of management, tracking, and communication activities.
5. Develop improved communication tools to inform the membership of financial activities and status at appropriate opportunities, such as the Annual Meeting.

APPENDIX B: CONTRIBUTORS

The Strategic Planning Committee would like to thank all those who contributed to the development of this strategic plan. To ensure greater coordination, the OLLI Board may wish to consider creating planned opportunities once or twice a year for the committee chairs to meet to discuss progress, challenges, overlap, and ways to assist in meeting membership goals. It is recommended that the Strategic Planning Committee be responsible for convening these meetings and use this opportunity to track progress on the strategic plan.

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Treasurer*, Dave Hensler

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