


# OLLI *at* SOU

## OLLI 2025

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### STRATEGIC PLANNING TASK FORCE

Osher Lifelong Learning Institute  
Southern Oregon University  
Ashland, Oregon

**April 28, 2020**

**OLLI 2025**  
**A Strategic Plan for 2020-2025**

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## Executive Summary

As summer preparations began for another year of courses and activities at OLLI at SOU, our OLLI 2025 Strategic Plan also came to life. In August 2019, President Pat Alexander contacted Larry Hunter (Current Vice President and President-Elect), and Sally Peterson (past Council member and co-chair of OLLI at SOU's 25<sup>th</sup> Anniversary Celebration in 2018) asking them to co-chair the OLLI 2025 Strategic Plan Task Force. Once complete, the Co-Chair division of tasks, a list of potential Task Force members, and an initial timeline were developed.

In September 2019, members of the Task Force were invited to participate, and there immediately seemed to be a tremendous amount of enthusiasm and energy created around the process.

Larry Hunter, OLLI 2025 Co-Chair; OLLI at SOU Council Vice President

Sally Peterson, OLLI 2025 Co-Chair; Past Council Member

Bob Adams – OLLI at SOU Member

Pat Alexander – OLLI at SOU 2019-20 Council President

Rob Casserly – Assistant Director, OLLI at SOU

Wayne Davison – OLLI at SOU Member

John Ferris – OLLI at SOU Member

Ann Lovett – OLLI at SOU Member

Margaret Pashko – OLLI Member; Past-President, OLLI at SOU Council

Sue Sorem – OLLI at SOU Council Member; Chair, Medford OLLI (MOLLI) Task Force

Lorraine Vail – OLLI Member; Chair, Strategic Plan OLLI 2020; Past President, OLLI at SOU Council

Elisabeth Zinser – Council Member; Past President, Southern Oregon University

The October 2019 meetings of the OLLI 2025 Task Force focused on developing the initial timeline and basic process for writing *OLLI 2025*. Discussions included a review of the OLLI at SOU Mission, Vision, and Values and a thorough review of the *OLLI 2020* document. It was decided since the *OLLI 2020* document was so well-written and thoughtfully organized, it would be the foundation for OLLI 2025. The format used in *OLLI 2020* was unanimously adopted for use in *OLLI 2025*, and it served that purpose throughout our process.

During November, a subcommittee of the Task Force met to work on specific wording of the Goals and Intentions, as well as Initiatives that were carried over from *OLLI 2020*.

In December 2019 and January 2020, many conversations occurred with OLLI at SOU's standing committees and the MOLLI Task Force. These discussions focused on the Goals and Initiatives that were at the heart of each group's work. The process of writing the document began with ongoing dialogue and feedback with both the standing Committees and the MOLLI Task Force.

February and March 2020 were dedicated to defining and revising the Goals, Intentions, and Initiatives.

Other parts of OLLI 2025 were also completed, such as the Introduction and Appendices. The “final” draft was made available electronically to Council, Committee Chairs, and members for review and edits prior to adoption.

Due to the COVID-19 outbreak and social distancing policies, we were unable to hold member Town Halls as planned or for OLLI leadership as a group to discuss in a “live” meeting. We also realize that the 2020-21 Annual Process for adopting initiatives will be delayed.

The proposed *OLLI 2025* was adopted by the OLLI at SOU Council on April 26, 2020 and posted on the OLLI website.

## **Part I. Mission/Vision/Value Statements**

### **Mission:** (purpose/focus)

*OLLI at SOU* is a member-driven educational community primarily serving adults ages 50 and older. We offer a diverse repertoire of courses and programs designed to foster lifelong learning, encourage social interaction, and provide cultural enrichment.

### **Vision:** (what we desire to be)

*OLLI at SOU* members will find intellectual stimulation, enjoyment, and invigorating learning opportunities in an accessible, comfortable, supportive and congenial environment.

### **Values:** (what we believe in)

We value the joy of learning and recognize the vital relationships among intellectual stimulation, social interaction, creative expression, and healthy aging.

We value a curriculum of depth and breadth taught by volunteer instructors and we promote programs that inspire our members to participate in OLLI and the broader community.

We value activities that encourage our members to volunteer their time, talent, skills, and resources.

We value excellence and measure our success by our members’ satisfaction with our curriculum, affordability, social opportunities, staff, and leadership.

We value equity, diversity, and inclusion in our membership, leadership, staff, roster of instructors, courses, and teaching methods.

We value the sustainability of our organization and the environment.

## **Part II: *OLLI 2020* Recap and What's Expected in the Next Five Years**

In March 2016, a strategic plan, titled *OLLI 2020*, was adopted by the 2015-16 OLLI at SOU Council. It included sixteen goals and 140 initiatives which defined how the goals could be achieved. Over the course of *OLLI 2020*, nearly all of these initiatives were implemented and the number of members, courses, instructors, enrollments, volunteers, Annual Fund contributors, shared-interest-groups, and Open House attendees grew. The long-awaited ReNEWall of the Campbell Center was completed thanks to the contributions of 1,000+ members and friends who generously contributed.

Following is an overview of membership growth and what OLLI might expect in the coming five years. For more information on membership, courses, finances, facilities, and staffing, see Appendix C.

### **Is OLLI still growing?**

OLLI at SOU membership resets to zero every July 1. OLLI's membership will grow each year only if the number of new members exceeds the number of members who do not renew. Membership grew by 10% annually from 2015-16 to 2016-17, before declining to an annual average of 6.4% in 2017-18 and 2018-19. In 2019-20, membership by the end of the winter term grew 2.9% compared to the same time period in 2018-19. With the partial closing of the Campbell Center during the renovation, and the impact of COVID-19 on spring term registration, a reasonable membership projection for 2019-20 is a (1%) decline from the prior year.

### **Does OLLI need to grow?**

Without attracting a sufficient number of new members to offset the members who leave, OLLI's fundraising and/or member fees would need to be increased substantially to maintain current programs and staffing. Maintaining current programs and staff does require 4% membership growth with periodic fee increases in order to keep pace with inflation.

### **Do most members return year-after-year?**

The member retention rate (renewing members divided by the prior year's total membership) has been averaging 80%. Most members renew every year while others skip a year or two before returning. OLLI has many members who have ten and more years with OLLI. The majority (65%) of members, however, joined within the past five years. (See Appendix C for an illustration.)

### **Is OLLI attracting new members?**

The number of new members held flat (510, 512, 504) for three years beginning in 2015-16. In 2018-19, new members declined to 477. OLLI's recent declining growth rate is attributed to the number of new members not offsetting the number of non-renewing members. What is of additional concern is that nearly half of the new members leave after a year. Considering the time and resources needed to attract and support new members, more work needs to be done to understand and improve member retention. (See Appendix C Table I for an illustration on how membership growth slows when the number of new members and the member retention rate flat remain flat.)

### **How does OLLI attract new members?**

OLLI uses both community outreach and media presence to reach new members. The annual July OLLI Open House attracts new members and encourages renewals from current members. The OLLI course catalog is distributed to organizations, libraries, and professionals in the Valley. Ads are placed with Jefferson Public Radio (JPR) and OLLI provides public-interest stories to the local media and maintains an internet presence. Outreach is also done through participation at community events such as senior fairs.

### **Is OLLI still attracting new members in Ashland?**

Ashland is a community of 20,000 with 44% aged 50+. Since OLLI does not have an age profile of its membership, we must make some reasonable assumptions. For example, if we assume all OLLI members are aged 50+, then 15-25% of Ashland's aged 50+ population is, or has been, a member of OLLI. If we assume nearly all of OLLI's members are aged 60+, the share increases to 25-30%. Knowing that Ashland's net population growth is minimal, it is reasonable to expect OLLI's annual growth in Ashland will be 3-5% annually. Talent is less saturated (9%-12%) but the 50+ population is much smaller in Talent so the growth in absolute numbers is limited.

### **What about Medford and its surrounding communities?**

Less than 3% of the 40,000 aged 50+ population in Medford and its surrounding communities of Phoenix, Jacksonville, Central Point, and Eagle Point are current or former OLLI members. While the potential is present, the Medford and its surrounding town's share of OLLI membership has remained flat at 26-28% for the past six years. In 2019-20, with more courses, events, and focus on offerings at the Medford HEC, membership growth is likely to be 5-7%. This will be an increase over the 3% in 2018-19 but less than the 9% membership growth rate in 2016 and 2017. Medford and its surrounding communities have growth potential but it will take time to develop this market and it will require a significant volunteer effort. Sustainability will depend on a substantial increase in courses offered and an expanded instructor pool. For financial planning purposes, the annual growth rate for this area should remain unchanged until progress is evident."

### **What growth is reasonable in the next five-years:**

Membership had been growing 11% annually when the *OLLI 2020* Task Force recommended the annual membership growth for the coming five years be planned at 5%. Since 97% of OLLI's expenses are needed to maintain current programs and services, a conservative approach was considered prudent to ensure OLLI's long term financial sustainability. Within two years, the 11% annual growth rate fell to 6.4%. Based on this membership trend, a reasonable projection for the coming five years is to plan for an annual 4% membership increase, with a 5% membership decline in the year of a member fee increase. This results in 2,400-2450 members by June, 2025.

**In summary,** member retention and attracting new members pose important strategic questions for OLLI at SOU to tackle in the coming five years. The advantages and disadvantages of having a slower

versus a more aggressive growth in membership should be examined for how it impacts the satisfaction of our members, volunteers, and staff as well as the organization's long-term financial stability.

### **Part III: OLLI 2025 Process and Responsibilities**

**Goals** “describe” OLLI at SOU in 2025. There are twelve goals in this strategic plan.

**Each goal has an intention** which describes the underlying “reason” for the goal and provides background information relevant to the goal.

**Each goal includes a list of initiatives.** Initiatives are “actions” for achieving the goal. The initiatives are a roadmap meant to focus OLLI's energy, resources, and time. Initiatives involve something new, or are a change to an existing practice. Initiatives align with OLLI's Mission, Vision, and Values and are not already part of an established policy, process, or committee's charge.

**The Annual Plan Process:** During the Annual Plan process, Committees and the Council will select which initiatives to pursue in the coming year. Over the course of the five-year span of OLLI 2025, Committee Chairs and Council members will change, and whether an Initiative is ever implemented will depend on member interest, volunteer commitment, operational feasibility, and Council's adoption.

Once an initiative is adopted into the year's Annual Plan, the Annual Plan Worksheet is completed, detailing the initiatives (who, what, when, how) and including applicable metrics. Later, when the initiative is completed, it is incorporated into existing policy, procedures, committee charges, as is applicable.

**Initiative Responsibility:** Each initiative is assigned a “lead” (see below). A lead is either the entity submitting the initiative or the initiative belongs to the OLLI Council per policy, procedure, or practice. A few initiatives have joint responsibility. When all initiatives are assigned to a single entity, the assignment is noted only once. When the initiatives are assigned to more than one entity, the assignment notion follows the initiative.

**Key to Committee/Staff lead assignments: (See Appendix B for more information).**

C: Council

CC: Curriculum Committee

CCO: Communications and Community Outreach Committee

FC: Finance Committee

FPM: Funds Policy Management Committee

FSN: Future Space Needs Committee

LDRC: Leadership Development and Recruitment Committee

MOLLI: Medford OLLI

MSC: Member Services Committee

S: OLLI at SOU Staff

## **Part IV: Goals, Intentions, and Initiatives**

### **These 12 Strategic Goals define OLLI at SOU in 2025**

#### **Member-Driven Organization**

**Goal 1:** Member engagement and satisfaction shape programs, activities, and operations.

#### **Lifelong Learning**

**Goal 2:** OLLI at SOU offers a diverse array of learning opportunities that address members' interests in intellectual, multi-cultural, recreational, and personal exploration in a wide variety of educational formats.

**Goal 3:** Courses continue to be of high quality, with well-supported volunteer instructors who are recruited from the membership, the University, and the community.

#### **Engagement and Communication**

**Goal 4:** Numerous opportunities exist for OLLI at SOU members from diverse backgrounds to engage in the wealth of volunteer opportunities, interact socially, develop friendships, share interests, find companionship, and experience a sense of community.

**Goal 5:** OLLI at SOU's Medford campus provides a growing number of courses, programs, and social opportunities for a growing number of members and instructors.

**Goal 6:** The methods of communication with OLLI at SOU members, prospective members, instructors, and donors are comprehensive and inclusive.

**Goal 7:** OLLI at SOU actively builds awareness of its Mission and offerings through alignment and involvement with SOU, as well collaborating with community organizations, the Osher National Resource Center, and other Osher Institutes.

#### **Governance, Staff, Finance, Fundraising, and Facilities**

**Goal 8:** The organization's governance structure, policies, and operations are well-defined and well-understood by leadership, interested members, volunteers, OLLI at SOU staff, and SOU administration.

**Goal 9:** Staff roles, responsibilities, and reporting lines are well-defined and well-understood by staff, Council, committee chairs, and interested members.

**Goal 10:** OLLI at SOU is financially sustainable and its member-driven programs ensure an affordable membership fee and scholarship assistance.

**Goal 11:** Facilities used for courses, events, activities, and staff operations provide a comfortable, accessible, safe, supportive, and congenial environment conducive to learning, working, and socializing.

**Goal 12:** OLLI at SOU members generously give of their time, talent, and resources.



## **Member-Driven Organization**

### **Goal 1: Member engagement and satisfaction shape programs, activities, and operations.**

**Intention:** This goal recognizes the essential importance of engaged and satisfied members to ensure OLLI at SOU remains a vital and sustainable organization throughout the region. Members who are encouraged to voice their opinions to shape OLLI's programs are more willing to renew, participate, serve, promote, and donate to OLLI.

#### **Initiatives:**

- a. Coordinate the data information and handout sheets from Inside OLLI presentations with that of the Team OLLI project. (MSC)
- b. Establish a "welcome committee" for new members by creating list of established members willing to mentor any new member who wants or requests such help. (MSC)
- c. Organize an annual Host Training get-together. (MSC)
- d. Include a regular procedure at the beginning of each term in all classes in which class hosts ask for new members to identify themselves. (MSC)
- e. Offer a member-to-member social time as a follow-up to those who have attended an Inside OLLI event. (MSC)
- f. Establish a "New Member" page on the OLLI website to aid new members with their orientation to OLLI and gather feedback from new members regarding their OLLI experience. (MSC).
- g. Include on the Annual Member Survey question(s) related to any discontinuation or substantial change to a long-standing OLLI practice that directly impacts members. (MSC)
- h. Include in OLLI's electronic letter, the Newsflash, a brief summary of annual member survey results and a link that provides more information on the most frequently mentioned areas for change and actions being taken in the coming year to address those member concerns. (MSC)
- i. Explore additional options to encourage early drops in order to permit better movement from waitlists into empty class seats. (CC/S)
- j. Explore new ways to manage wait lists in order to fill empty seats more efficiently. (CC/S)

## **Lifelong Learning**

### **Goal 2: OLLI offers a diverse array of learning opportunities that address members interests in intellectual, multi-cultural, recreational, and personal exploration in a wide variety of educational formats.**

**Intention:** This goal recognizes both the wide-ranging interests of members and the importance of having a well-balanced curriculum which includes small and mid-sized discussion courses as well as large lectures, skill development and recreational courses. While many members choose traditional subjects, others prefer personal exploration courses or hands-on skill development experiences.

#### **Initiatives:**

- a. Expand educational offerings to meet the needs of a growing and changing membership by working with instructors to maximize offerings in areas of greatest demand per category. This effort will utilize OLLI at SOU data and information from other Osher institutes. (CC)

- b. Continue to encourage a diverse selection of both lecture and discussion courses as well as experiential and personal development learning opportunities. (CC)
- c. Survey the level of membership interest in distance-learning, OLLI course streaming, and emerging technology. (CC)
- d. Establish coordinator(s) to oversee and help members who wish to organize a day-long field trip. (MSC)
- e. Explore member interest and opportunities for an “educational” travel program. (MSC)
- f. Develop extra-curricular offerings for members that are alternatives to the Curriculum Committee’s catalog of courses. This would include a survey of other Osher Institutes who offer such programs. (MSC)
- g. Explore member interest in evening/weekend lectures, courses, or workshops. (MSC)

**Goal 3: Courses continue to be of high quality, with well-supported volunteer instructors who are recruited from the membership, the University, and the community.**

**Intention:** What constitutes a quality educational experience varies by learner and circumstance. This goal recognizes the value of recruiting instructors who are knowledgeable, organized, enthusiastic, and willing to be mentored in such areas as course preparation, organizational skills, IT competence, classroom dynamics, and the unique challenges of lifelong learning.

**Initiatives: (CC)**

**1. Recruitment:**

- a. Explore new ideas to actively recruit qualified volunteer instructors from the membership, University, and the community.
- b. Actively recruit qualified volunteer instructors from the membership, University, and the community who bring greater diversity to the instructor pool and course offerings.
- c. Broaden efforts to establish relationships with SOU and Rogue Community College academic departments and programs to bring faculty and graduate students into OLLI in an educational capacity (e.g., instructors or guest speakers).
- d. Explore ideas for a cooperative relationship with the Oregon Shakespeare Festival and present to the OLLI Council.
- e. Develop and provide a workshop to recruit prospective new OLLI instructors.

**2. Course Evaluation:**

- a. Develop an efficient system to provide opportunities for member feedback in all OLLI courses to the Curriculum Committee.

**3. Support and Training:**

- a. Develop and provide an orientation session to be required for all new to OLLI instructors.
- b. Survey OLLI instructors and develop and provide workshops targeted to their identified interests and instructional needs.

## Engagement and Communication

**Goal 4: Numerous opportunities exist for OLLI members from diverse backgrounds to engage in OLLI's wealth of volunteer opportunities, interact socially, develop friendships, share interests, find companionship, and experience a sense of community.**

**Intention:** This goal recognizes that OLLI's volunteer and social activities contribute to members' physical, cognitive, and social well-being. The goal also affirms the ongoing need for both leadership and staff to respect and recognize the contributions of volunteers and to provide meaningful and rewarding volunteer opportunities to our members.

**Initiatives:** (MSC)

- a. Develop content for an OLLI member "Meet-Up" page on the OLLI website.
- b. Establish a rotating book club.
- c. Develop a member skill and interests' database to support Member Services activities and volunteer activities.
- d. Explore ways for volunteers to provide support to OLLI members at the HEC.
- e. Promote in the Newsflash the value and rewards of volunteering with photos and short stories of OLLI's volunteers.

**Goal 5: OLLI at SOU's Medford campus provides a growing number of courses, programs, and social opportunities for a growing number of members and instructors.**

**Intention:** The OLLI Medford campus at the RCC/SOU Higher Education Center (HEC) was established to provide classes centrally located in Jackson County for better access by members in that county's population center and outlying areas as well as those in Josephine County. The OLLI program in Medford will succeed to the extent current and future members experience expected value according to the OLLI mission and vision.

**Initiatives:**

- a. Establish a method to report the Medford/HEC number and percent of members living north of Talent; the number and percent of courses, sessions, seats offered and enrolled; participation in Conversation Connections, social and cultural events. Identify targets to measure progress. (C)
- b. Annually survey OLLI's Medford-area learners to assess their satisfaction with Medford's educational and social opportunities and determine improvements needed. (MOLLI)
- c. Assist the Curriculum Committee by sourcing potential new-to-OLLI instructors with the intent of adding new courses to the Medford offerings. Reach out to current instructors to consider new courses or repeat courses. (MOLLI)
- d. Develop opportunities in the Greater Medford Area to promote the value of teaching at OLLI, e.g., presentations to groups of retirees with the intent to attract more OLLI instructors. (MOLLI)
- e. Participate in the OLLI annual Open House and other area-wide community events, e.g., Medford Open Streets, to promote the Medford program and recruit new members and potential new instructors, as appropriate. (MOLLI)
- f. Increase social engagement at the HEC through the "greeter" program which welcomes learners at the beginning of each term. (MOLLI)

**Goal 6: The methods of communication with OLLI members, prospective members, instructors, and donors are comprehensive and inclusive.**

**Intention:** This goal affirms the value of keeping current and prospective members and instructors fully informed of OLLI's offerings and opportunities.

**Initiatives: (CCO)**

- a. Evaluate and implement new communication methods and tools best suited to the various constituencies identified in this goal.
- b. Establish an online archive system, develop the system protocol and recruit an archivist to maintain a repository of printed materials, promotional materials, videos, press releases, annual meeting presentations, historical documents and other related materials.
- c. Produce an e-blast following the Annual Member Meeting which includes a link to a summary (pdf, video, or both) of the meeting's highlights.

**Goal 7: OLLI actively builds awareness of its Mission and offerings through alignment and involvement with SOU, as well as collaborating with community organizations, the Osher National Resource Center, and other Osher Institutes.**

**Intention:** This goal recognizes that the strength of OLLI at SOU flows from both our independence as an educational entity and our interdependence with SOU and other Osher Institutes, and the plentiful opportunities available through collaboration and sharing resources.

**Initiatives:**

- a. Explore the possibility of a collaborative program to connect intergenerational students at SOU and OLLI at SOU. (C)
- b. Reach out to other OLLIs and/or the Osher NRC to gather ideas for OLLI at SOU. (C)
- c. Pursue partnerships with other Osher Institutes sharing similar missions and aspirations, as well as community organizations with complementary missions (C)
- d. Explore the possibility of a collaborative arts program with the Oregon Center for the Arts. (C)
- e. Develop a process to promote and facilitate OLLI members auditing SOU courses. (MSC)
- f. Develop a plan for OLLI members to volunteer for the University wherever it would be most helpful. (MSC)
- g. Explore the viability of developing a program that matches international exchange students with OLLI members who are interested in inviting students to their homes for dinner or to some other off-campus activity. (MSC)
- h. Increase OLLI's visibility on the SOU website, *Inside SOU*, inclusion of major OLLI events, for example, community lectures, the OLLI at SOU Open House, fundraising events, etc. (C)

**Governance, Staff, Finance, and Facilities**

**Goal 8: The organization's governance structure, policies, and operations are well-defined and well-understood by leadership, interested members, OLLI staff and the SOU Outreach and Engagement Director.**

**Intention:** A member-driven organization is dependent on a core group of committee and trained volunteers who work together with OLLI staff to positively impact every aspect of operations. This goal recognizes the need for collaborative and transparent processes of deliberation and decision-making, the importance of ongoing training, and the understanding of and respect for roles, responsibilities, and behavioral norms in line with the OLLI at SOU bylaws: “The OLLI Council shall supervise, control, and direct the affairs of OLLI at SOU, pursue its purposes, and determine its policies, consistent with policies of SOU.”

**Initiatives:**

1. Strategic Plan development, Adoption, and Integration: (C)
  - a. Establish a process for the annual review of 2025 Strategic Plan goals with leadership and members.
  - b. During the five-year plan, incorporate into Council policy, committee charges, and committee codified practices all completed initiatives that address procedure and practice.
  - c. Convene a new task force in 2024-25 to develop the next five-year strategic plan.
2. Annual Plans: (C)
  - a. Ensure Council officers and Committee Chairs meet quarterly to review and collaborate on Annual Plan initiatives activities for the coming term.
  - b. Plan for 4% annual membership growth during the five-year period. Reduce this rate to a 5% loss in the year of a member fee increase. If actual results are exceptionally different, adjust the annual plan rate accordingly.
3. Council Meetings: (C)
  - a. Ensure that a review of the By-Laws and Section VI of OLLI Policies and Procedures and Committee charges is included in Council orientation.
  - b. Allocate time at a Council meeting for Committee Chairs to present a summary (how many? what was said?) of member’s comments to the write-in questions from the prior year’s Annual Member Survey that pertain to their committee charge, and identify the Annual Plan initiatives or other activities they have planned for the year to address those member comments.
4. Committees and Task Force: (C)
  - a. Ensure all standing committees have chairs and members identified at the start of the OLLI year.
  - b. Develop and document the Personnel Committee’s charge, roles and responsibilities, and processes.
  - c. Add to the Finance Committee’s charge that Council will be presented at the September meeting an updated “balanced” budget for the year.
  - d. Amend the Finance Committee membership to include at least one member from each Council class to serve on the committee.
  - e. Add to the Finance Committee’s charge to carefully assess any requests for increased staff costs which impact membership fees. Evaluate the availability of volunteers to perform the tasks, or changes to work processes, that is provided by staff.
  - f. Revise the FPM committee charge to reflect, as appropriate, the current strategic plan initiatives.

- h. Consider creating a standing committee to expand OLLI at SOU's "extra-curricular" alternatives. This would involve surveying other Osher Institutes who excel in this area.
  - g. Establish a Task Force to assess interests in OLLI, and identify strategies to engage more seniors of underrepresented groups in the Rogue Valley in OLLI, in order to expand our cultural diversity and enrich our classes and events.
  - h. Establish a Task Force to conduct a review of OLLI at SOU's staffing needs from a strategic planning perspective, including long-term recommendations.
  - i. Establish a Task Force to evaluate the current utility of the course registration system, OLLI website, and other communications software and propose recommendations to Council for improvement. CCO will provide consultant support to this effort. (C)
5. Leadership Development and Recruitment:
- a. Require each OLLI standing committee to identify, organize and record their operational processes and procedures by the end of 2020-2021. This work is to ensure for an orderly transition between committee chairs. (C)
  - b. Complete an evaluation of the current leadership development and recruitment program, Team OLLI, and develop a plan for enhancements to include consideration of a phased-in program where members progress in their knowledge and commitment to OLLI. (LDRC)
  - c. Encourage collegial and collaborative meetings by including meeting agreements in agendas, and briefly discussing the agreements and their purpose at the first Council meeting of the year, as well as Committees or other groups each term. Team OLLI will also distribute the agreements and discuss them with participants. (S)
  - d. Educate OLLI leaders on the importance of prioritizing volunteer engagement and satisfaction, and emphasizing how working with volunteers differs from managing paid employees. This concept is to be included in a session of each Team OLLI series, and in other leadership training sessions. New Council members, chairs and leads will meet with the Volunteer Coordinator if unable to attend a group discussion. (S)
6. Council Policies and Procedures: (C)
- a. Identify all current Council Policies and procedures that differ from current practice and resolve by adopting a revised Policy and Procedure or changing practice.
  - b. Incorporate into policy the procedures to be followed when either Council or OLLI/SOU staff are proposing changes to established practice relating to processes and operations which directly impact both OLLI Council and/or Committees and OLLI/SOU staff.
  - c. Incorporate into policy the procedures to be followed when either Council or OLLI/SOU staff are proposing changes to established member programs and practices.
  - d. Include in any staffing change proposal all possibilities for what the salary/benefit expense might be in the current year and also the "time in position" step increases which would be included in the evaluation using OLLI's ten-year financial model.
7. Metrics (C)
- a. Identify and implement metrics that will benefit program planning, financial sustainability, member retention and engagement, and governance.

**Goal 9: Staff roles and responsibilities are well-defined and well-understood by staff, Council, committee chairs, and interested members.**

**Intention:** This goal recognizes the importance of staff satisfaction with their roles, responsibilities, working environment, and support. A caring and competent professional staff is critical to member satisfaction and OLLI's operational efficiency and effectiveness.

**Initiative:**

- a. Utilize OLLI's IT students to assist with the materials and hands-on training for instructors and Member Services Committee volunteers. (S)

**Goal 10: OLLI at SOU is financially sustainable and its member-driven programs ensure that OLLI at SOU remains affordable and offers scholarship assistance**

**Intention:** This goal affirms the importance of OLLI's volunteer structure, as well as the time given and the work performed by OLLI's volunteers, in maintaining our affordable membership fees and scholarship assistance.

**Initiatives: (FC)**

- a. Present to Council the impact on the operating fund balance as a result of various scenarios for the Osher endowment performance, membership growth, income and expense projections that result from the latest annual update of OLLI's ten-year financial planning model.
- b. Evaluate the current "operating fund balance 35% of expenses" policy, now that funding for the Campbell Center Renovation is secured, and report to Council.

**Goal 11: Facilities used for courses, events, activities, and staff operations provide a comfortable, accessible, safe, supportive, and congenial environment conducive to learning, working, and socializing.**

**Intention:** This goal recognizes the value of providing a functional and aesthetic facility and grounds for members and staff.

**Initiatives: (FSN)**

- a. Communicate the methodology and metrics for venue utilization rates of all OLLI classroom venues. Report findings to Council by term and annually. (FSN)
- b. Create and publish a description of all venues offered by OLLI and also those commonly used by instructors, member services functions and leadership. Document includes availability, seat capacity, room amenities (tables, chairs, sinks, etc.), ADA attributes, IT/AV media on site, parking, if a rental fee paid by members, etc. (FSN)
- c. Recommend to Council a process for determining whether any venue which charges rent will be paid for by the OLLI members enrolled in the class/event or from OLLI funds. (FSN)
- d. Explore the requirements for a permanent art studio space and assess venue alternatives.

**Goal 12: OLLI at SOU members give of their time, talent, and resources to OLLI.**

**Intention:** This goal recognizes our desire for OLLI at SOU to be a culture of generosity in which we encourage our members to be as generous as they are able to be. While monetary giving is an important sign of generosity, giving of time and sharing of ideas are of equal importance.

**Initiatives: (FPMC)**

- a. Establish a “culture of generosity” by concentrating on branding, continuity of message, and consistency.
- b. Identify OLLI members who would be well-suited to being “ambassadors of generosity” during fundraising appeals.
- c. Promote the Legacy Fund to long-standing OLLI donors for both end of life bequests and support of the OLLI endowment.
- d. Establish a detailed process for improving how OLLI acknowledges and thanks its donors.
- e. Propose more aggressive targets for the Annual Fund both in terms of number of donors and donations.
- f. Consult with the Southern Oregon University Foundation on ways to improve OLLI’s fundraising efforts.
- g. Explore more ideas for OLLI fundraising events which provide opportunities for volunteering and socializing.
- h. Work with Southern Oregon University Foundation to identify resources for promoting OLLI’s presence into the Greater Medford area.



## Part V: Conclusion

The Task Force's main goal was to write a document that would provide the framework for OLLI at SOU for the next 5 years and support the efforts of leadership in guiding ongoing growth and development of OLLI at SOU through 2025.

The 2025 Strategic Plan Task Force is a group of diverse people who brought varied experiences and interests to the table. Each individual shared his or her unique perspective as an OLLI member, OLLI Council member, or Committee Chair. Several Task Force members had been active participants in the OLLI 2020 Strategic Plan Process, which was invaluable. The input and experiences of two past presidents, the current president, and the president elect were critical. Having a staff member on the Task Force provided support and a different perspective.

Throughout the process of writing the document, OLLI 2025, the Task Force kept the following question in the forefront: "What should OLLI at SOU look like in 2025?" It was the question that consistently directed our conversations and the writing of the document.

The *Mission, Vision, and Values* were our constant guide. It was the first element of the Strategic Plan that the Task Force reviewed. During our first meetings, it was decided that the *Mission, Vision, and Values* are very strong and still quite relevant today exactly as they are written. The Task Force decided to remain open to any possible modifications that came up as part of the process. In fact, two new *Values* were added based on conversations that occurred at the Committee and Task Force level.

One of the key priorities of the Task Force from very early on was including input from all constituencies. All Standing Committees were involved in the conversation very early on in the process and during the numerous ongoing revisions. Council was kept apprised of the progress each month at the Council Meetings and had an opportunity for input to the OLLI 2025 co-chairs. Staff was included in the conversation about Goals and Initiatives that were pertinent to their work. A Member Town Hall provided all members an opportunity to learn about the process and offer input to the document before the Strategic Plan was adopted by the Council.

Larry Hunter

Sally Peterson

Co-Chairs, Strategic Plan 2025 Task Force

## Appendix A

#	Goal	Page	c	cc	cco	FC	FPMC	FSN	LDRC	MOLLI	MSC	s
1	Member Engagement and Satisfaction	8		i-j							a-h	i-j
2	Diverse Learning Opportunities	8		a-c							d-g	
3	Quality of Courses and Instructor Support	9		all								
4	Volunteer and Community Engagement	10									all	
5	OLLI Programs and Membership Growth in Medford	10	a							b-f		
6	Communications and Community Outreach	11			all							
7	Collaboration with SOU, Osher Institutes, Organizations	11	a-d		h						e-g	
8	Governance, Structure, and Operations	11	1-4, all. 5a						5b			5c-d
9	Staff Roles and Responsibilities	13										all
10	Membership Affordability & Financial Stability	14				all						
11	Safe and Accessible Facilities	14						a-d				
12	Culture of Generosity	14					a-h					

## **Appendix B**

### **Mission Statements: Committees, Council, Staff, Task Force**

#### **COMMUNICATIONS AND COMMUNITY OUTREACH COMMITTEE**

The Communications and Community Outreach (CCO) Committee is responsible for disseminating information between OLLI and the greater community and within the OLLI membership.

#### **COUNCIL**

The OLLI at SOU Council (C) shall supervise, control, and direct the affairs of OLLI at SOU, pursue its purposes, and determine its policies, consistent with policies of SOU.” OLLI at SOU By-Laws Article VI Section 1.

#### **CURRICULUM COMMITTEE**

The Curriculum Committee (CC) is responsible for meeting the expectations of OLLI members for a wide variety of high-quality learning experiences by recruiting and supporting instructors and processing course proposals for preparing accurate course descriptions in the catalog.

#### **FINANCE COMMITTEE**

The Finance Committee (F) is responsible for providing financial guidance and oversight for the organization. Activities include creating and updating annual budgets and monthly financial reports for Council and the membership, and monitoring of financial policies and activities.

#### **FUNDS POLICY AND MANAGEMENT COMMITTEE**

The Funds Policy and Management Committee (FPM) is responsible for fundraising and fund development activities in support of OLLI's mission through annual giving, legacy/planned giving, foundation and corporate giving, grants and special fundraising events.

#### **FUTURE SPACE NEEDS COMMITTEE**

The Future Space Needs Committee (FSN) is responsible for understanding the current needs and to anticipate the future needs for classroom, technology, social, and parking.

#### **LANDSCAPE COMMITTEE**

The Landscape Committee (L) is responsible for maintaining the Campbell Center courtyard garden beds and the landscaping at the entrances to the courtyard.

#### **LEADERSHIP DEVELOPMENT AND RECRUITMENT COMMITTEE**

The Leadership Development and Recruitment Committee (LDRC) is responsible for identifying and recruiting committed volunteers to assume leadership roles in OLLI, including serving as committee chairs, leads on special projects and Council members.

#### **MEMBER SERVICES COMMITTEE**

The Member Service Committee (MSC) is responsible for engaging and energizing members through a variety of membership events, activities, and volunteering opportunities while helping to build a vibrant community.

#### **STAFF**

Staff (S) is responsible for the day-to-day management of the OLLI Program, carrying out administrative tasks at the direction of an OLLI elected Council and the Director of Outreach and Engagement.

#### **TASK FORCE:**

##### **MEDFORD OLLI (MOLLI)**

MOLLI is responsible for the continued success and sustainability of the OLLI Medford campus through the engagement of members who attend most of their classes at the Higher Education Center (HEC).

## Appendix C

### OLLI at SOU Membership, Courses, Finances, Facilities, Staffing

Southern Oregon Learning in Retirement (SOLIR) began in 1993 with 104 members and a \$75 member fee. SOLIR grew steadily to 970 members before becoming OLLI at SOU in 2009. Membership growth remained around 10% annually until slowing to 6.6% growth beginning in 2017. OLLI is expected to reach 2,200 members in 2020.

Among the 124 Osher Institutes, OLLI at SOU is ranked in the top 15 for the number of members. In 2019, more than two-thirds of the Osher Institutes reported a 5% plus annual growth, likely attributable to the increasing number of baby-boomer retirees and increased media coverage for lifelong learning as a component of healthy aging.

OLLI at SOU membership resets to zero every July 1. During the year, new members join and former members either renew or not. OLLI’s recent declining growth rate is attributed to the number of new members not offsetting the number of non-renewing members. The number of new members began flattening in 2015 and declined in 2018-19. If the number of new members remains flat or declines, the renewal rate must increase to compensate if OLLI is going to grow. Table I illustrates the impact on the annual growth rate when the retention rate remains at 80% and the number of new members also remains unchanged.

Table I	Members	Prior Year Renewing at 80% a year	New Members	Sum of Renewing and New Members	YOY Growth %
YR 1	1400	1120	500	1620	16%
YR 2	1620	1296	500	1796	11%
YR 3	1796	1437	500	1937	8%
YR 4	1937	1549	500	2049	6%

Table II below compares OLLI 2019-20 to 2012-13, a pivotal year when OLLI implemented an online registration system, the office manager retired, and Council announced the fee increase from \$100 to \$125 in the coming year. To understand the changes in OLLI since this turning point, the following data and inquiry focus on membership, finances, programs, facilities, and staff. **2019-20 estimates are a projection of membership if spring term had been business-as-usual. The actual results will be fewer members, less income, and a lower Osher endowment.**

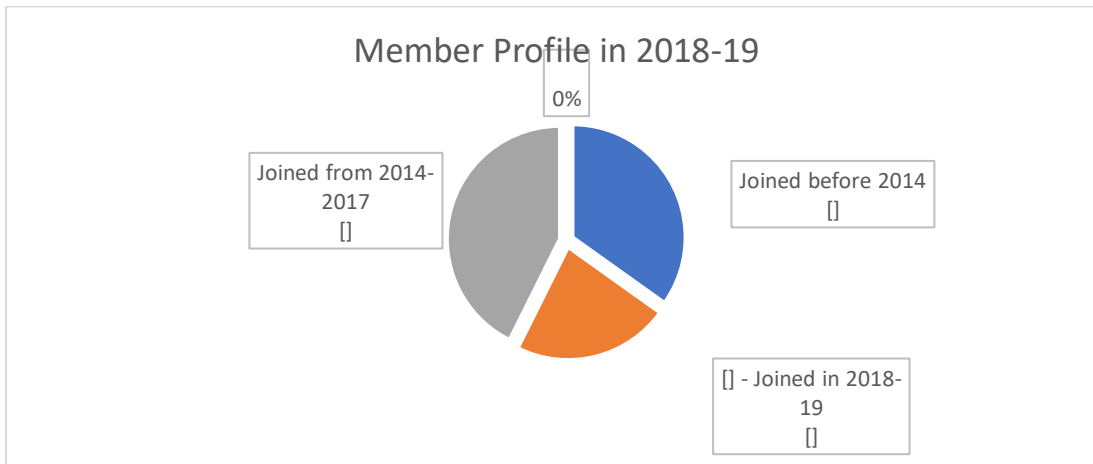
Table II	# of Members	# of Courses	Member Fee Income (k)	Annual Fund (k)	Osher Distrib (k)	Personnel Expense (k)	Facilities & Office Ops (k)	Program Expense (k)	End of year "Savings" (k)	% Reside North of Talent	Osher Endowment (M)
2019-20 est	2200	356	\$256	\$38	\$126	\$269	\$137	\$11	\$126	29%	\$2.2 est
2012-13 act	1577	297	\$160	\$26	\$165	\$144	\$141	\$18	\$137	29%	\$2.2
change	40%	20%	60%	46%	-24%	87%	-3%	-37%	-7%	-	-

**1. What do we know about OLLI at SOU members and course offerings?**

- a. In 2018-19, membership grew 6.6% to 2,121, an increase of 132 members over the prior year. New members (477) declined by 5% and 345 members did not renew. With flat or a declining number of new members, OLLI’s member retention of current members is especially critical.
- b. In 2019-20, membership by the end of the winter term grew 2.9% compared to the same time period in 2018-19. With the partial closing of the Campbell Center during the renovation, and the impact of COVID-19 on spring term registration, a reasonable projection for 2019-20 is a 1% membership decline from the prior year.
- c. Courses, sessions, and “seats offered” (max seats in each course) steadily increased in all but one of the last 4 years. Courses and “seats offered” kept pace or exceeded membership growth in two of the last four years. Waitlisted requests per enrolled member remained flat (1.2 requests waitlisted per member) but the percent of waitlisted courses increased slightly from 38% to 43%. On the extra-curricular side, Shared Interest Groups (SIGS) have also grown in number and member participation.

**2. What do we know about member tenure?**

- a. The pie chart below shows the member mix in 2018-19: First-year members are 22% of the total, members who joined from July 2014 to June 2018 are 43% of the total, and long-term members are 35%. While many members remain with OLLI members for ten years and more, the majority (65%) of the membership have joined in the prior five years.



**3. Why do members not renew?**

- a. OLLI does not survey non-renewing members so information is anecdotal. Overall, OLLI’s retention rate is 80%. This rate is a mix of long-term members with a higher renewal rate and new members who have a lower retention rate. We can speculate that long-term members are more likely not to renew due to mobility issues, failing health, or death than members who leave after one year. Considering the work involved in attracting and supporting new members, this is a lost opportunity and more information is needed.

**4. Has OLLI ever had a membership decline?**

- a. Membership declined only once in OLLI’s twenty-six years. The decline was 8% in 2013-14, the same year as the fee increase from \$100 to \$125. There were other factors that year which contributed to this decline but it is reasonable to assume that a comparable fee increase could slow membership growth again.

**5. How does OLLI at SOU recruit new members?**

- a. Members often report *word-of-mouth* is how they learned of OLLI. In Ashland, with a larger membership base, smaller population, and many interconnected networks, word-of-mouth may be more effective than in a larger metro area like the Medford area with a small membership base. Targeted outreach and building relationships with distinct subgroups in the Medford and its adjoining communities may yield more success in recruiting and engaging new members.

**6. Has OLLI at SOU “saturated” the aged 50+ demographic? See page 7 for more detail**

- a. Ashland is a community of 20,000 with 44% aged 50+. Since OLLI does not have an age profile of its membership, we must make some reasonable assumptions. For example, if we assume all OLLI members are aged 50+, then 15-25% of Ashland’s aged 50+ population is, or has been, a member of OLLI. If we assume nearly all of OLLI’s members are aged 60+, the share increases to 25-30%. Knowing the Ashland net population growth is minimal, it is reasonable to expect that

Ashland's membership would grow at 3-5% annually. Talent is less saturated (9%-12%) but the 50+ population is much smaller in Talent so the growth in absolute numbers is limited.

**What about the Medford and its surrounding communities?**

- a. Less than 3% of the 40,000 aged 50+ population in Medford and its surrounding communities of Phoenix, Jacksonville, Central Point, and Eagle Point are current or former OLLI members. While the potential is evident, the area's share of the OLLI's total membership has remained flat at 26-28% for the past six years. In 2019-20, with more courses, events, and focus on offerings at the Medford HEC, membership growth is likely to be 5-7%. This will be an increase over the 3% in 2018-19 but less than the 9% membership growth rate in 2016 and 2017.

**7. Does OLLI "advertise" for new members?**

- a. Yes. The annual OLLI Open House is designed to attract new members and encourage renewals from current members and is advertised in the local papers. The OLLI course catalog is distributed to many organizations, libraries, and professionals in the Valley. Ads are placed with Jefferson Public Radio (JPR) twice a year and public interest stories are published/aired by local media. Outreach is extended through participation at community events such as senior fairs.

**8. How has staff and other administrative support changed as the membership and programs have grown?**

- a. Since 2013, staff FTE (full-time equivalents) increased from 2.25 to 3.0. In 2015, the Volunteer Coordinator position was added and in 2018, the Office Assistant position became full-time.
- b. Student IT workers were added in 2012. Presently, IT students are at the Campbell Center 25-30 hours per week during each ten-week term.
- c. OLLI began the PEAK student worker program in 2015. This student is at the Campbell Center ten hours per week based on student availability.
- d. Member staffing (as needed) the Ashland office reception desk increased from part-time to full-time in 2018. These volunteers are invaluable for greeting and answering current and future member's questions.
- e. Many other factors have lessened the impact of membership and program growth on office operations during these years. These include staff's thoughtful planning, the reengineering and eliminating of many time-consuming administrative and member-support processes, members entering (65-70%) of their course requests on-line, days added to the catalog production period, increased staff proficiency with CampusCE, elimination of course material fees handled by office staff, an enhanced OLLI website and member communications, and finally, the many incremental hours of staff support needed during the renovation and fundraising for the Campbell Center ReNEWall.

**9. How does OLLI's \$125 membership fee compare to other Osher Institutes?**



- a. OLLI's all-inclusive flat annual fee is the simplest of all fee structures and requires the least administrative support. More complex models include tiered membership fees, variable fees per course, course limits by tier, various registration fees by term. For members taking many courses during the academic year, OLLI at SOU is the most economical structure in contrast to members taking one or two courses per term.

**10. Is OLLI financially sustainable?**

- a. OLLI's financial policy requires a balanced budget and "savings" equal to 3.5 months of operating expenses. In 2019-20, OLLI is expected to have slightly more income than expense. In the coming years, OLLI will need careful expense management in order to balance the budget and avoid multiple member fee increases.
- b. OLLI's "savings" however have been reduced to 2.5 months of operating expenses and will need restoring. This savings decline is a result of many factors including a lower membership growth rate, an increase in personnel expense, delaying the member fee increase until after the fundraising for the renovation was secured.

**11. Is it possible to reduce OLLI expenses to avoid an increase in the member fees?**

- a. Only 3% of the OLLI's expenses can be reduced without changing significantly OLLI's programs or staff. OLLI's basic operations (salaries, wages, benefits, rent, parking, office operations, and SOU/SOUF business services) account for 97% of OLLI's annual budget. If operations and OLLI's programs are to remain unchanged, a member fee increase will be needed no later than 2021 in order to balance the budget and restore OLLI's "savings".

**12. Does OLLI have the facilities needed to accommodate this growth?**

- a. Yes. The Medford HEC has additional classrooms available to accommodate growth.
- b. In Ashland, the renovated Campbell Center can accommodate up to 100 courses a term if all time slots were used. As many courses are limited to 2, 3, 4, and 5 sessions, more than one course can be scheduled in a single 10-week time slot. This increases the capacity for the Campbell Center to 140 courses per term. The most popular time slots will be over-requested but there is a sufficient number of seats and rooms to accommodate the demand in other time slots for instructors willing to accept another day and/or time.

**Conclusion:**

Membership had been growing 11% annually in 2016 when the *OLLI 2020* Task Force recommended the annual membership growth for the coming five years be planned at 5%. Since 97% of OLLI's expenses are needed to maintain current programs and services, a conservative approach was considered prudent to ensure OLLI's long term financial sustainability. Within two years, the 11% annual growth rate fell to 6.2% and 6.6%.

Given the sizeable share of Ashland's 50+ age group who are already OLLI members, membership growth in Ashland is likely limited to 3-5%. Medford and its surrounding communities have more growth potential but it will take time to develop this market and it will require a significant volunteer effort. Sustainability will depend on a substantial increase in courses offered and an expanded instructor pool. For financial planning purposes, the Medford area annual growth rate should remain unchanged until progress is evident.

Based on this membership trend, a reasonable five-year projection is to plan for an annual 4% membership increase with a 5% decline in the year of a member fee increase. This results in 2,400-2450 members by June, 2025.

**In summary,** OLLI's outreach and media presence is critical for attracting new members to replace those members who do not renew. Without attracting a sufficient number of new members to offset members who leave, OLLI's fundraising and/or membership fees would need to increase substantially to maintain current programs and staffing.

The advantages and disadvantages of having a slower versus a more aggressive growth in membership should be examined for how it impacts the satisfaction of our members, volunteers, and staff as well as the organization's long-term financial stability.

### **Appreciation**

Many thanks to OLLI member Linda Anderson for maintaining, summarizing, and charting the data. Without Linda's ongoing work, the insights that can be gained from OLLI's data would not be possible. Many thanks to Task Force members Lorraine Vail for analyzing the data and Elisabeth Zinser for assisting with the narrative. Additional thanks to OLLI member Ed Smith for his analytical modeling and Cliff Edwards for final editing.