

## Ad Hoc Wait List Work Group

### Final Report to the OLLI Board of Directors and OLLI Executive Director

#### Introduction

In June 2013, OLLI President Martha Scanlon created an Ad Hoc Wait List Work Group to:

- Examine the nature and extent of current wait list issues affecting OLLI;
- Report Group findings to the OLLI Board; and
- Submit to the Executive Director suggestions for addressing wait list issues in the near term.

Serving on the Group were Board members Glenn Kamber (facilitator), Beth Lambert, Bill Reader, Russell Stone, and John Woods (also participating as Interim Executive Director), and OLLI staff Kerin Braudaway, Beth Davis, and Karen Nash.

#### Wait List Assessment

In order to gauge the nature and extent of current wait list issues, the Ad Hoc Work Group reviewed registration and wait list procedures, recent registration experiences, and wait list data compiled by staff since 2011. Of particular interest were wait list issues confronted by the Executive Director and staff during the two most recent registration periods (Summer and Fall, 2013) as both terms involved accelerated growth in membership and course requests. In addition to examining registration and wait list procedures and data, the Work Group received and considered comments and recommendations from several OLLI members.

Due to uneven and incomplete OLLI course attendance information, the Work Group was not able to compare and contrast registration and enrollment numbers to actual class participation. Such a comparison would have enabled the Group to assess whether current registration procedures result in needed and appropriately-sized wait lists.

#### Findings

Based on Work Group assessment of available information, we find that:

##### ***1. Course registration and wait list management procedures are fair and impartial.***

A computer program is used by the Executive Director and staff to randomly assign registrants to requested courses and activities. The program is designed to take into account priorities that members identify during registration. Enrollment problems or issues raised by individual members are addressed expeditiously by the Executive Director or staff. The order of members placed on wait lists (i.e. first to be called, second to be called, etc) is based on member-identified priorities and, within each priority, determined randomly. When staff learns of course withdrawals, they quickly move wait listed members into class.

**2. *Wait lists occur for different reasons depending on the nature of each course or activity. OLLI staff recognizes those differences and tailors administrative actions accordingly.***

The Executive Director and OLLI staff have worked diligently in recent years to keep wait lists for all types of courses and activities to a minimum and, when lists are needed, to efficiently manage their disposition. Potential wait lists identified during registration are addressed differently depending on the reason(s) all registrants are not able to be enrolled and the type the over-subscribed program(s) for which wait lists may be needed:

- *Limited Capacity Events* -- OLLI sponsors many courses and special events such as field trips, hands-on or equipment-focused instruction with set participation limits due to logistical or other considerations. These activities are quite popular, often over-subscribed during registration, and generate a significant number of wait lists every term. While wait lists are both predictable and inevitable for these programs, staff has made every effort to maximize member participation through: 1) close monitoring of each event post-registration to keep all available enrollment “slots” assigned and utilized; 2) assuring that first-time enrollees are served before members requesting repeat participation; and 3) encouraging instructors to sponsor popular special events one or more times in the future.

A Work group suggestion to the Executive Director on how to further improve registration and wait list management for special events is included in the last section of this report.

- *Seminars and Group Discussion Courses* – Some OLLI courses are designed and conducted as seminars or small group discussions. Enrollment limits for these courses are often set by instructors to encourage a particular level of participation and interaction among attendees. Staff respects instructor prerogatives to set course enrollment limits. When seminar-style courses are over-requested during registration, staff routinely informs instructors of pending wait lists and seeks their guidance on wait list disposition. Instructors may be willing to admit a small number of members above originally set class enrollment limits, thereby reducing or eliminating wait lists. And, as with special events, staff encourages instructors of over-subscribed seminar-style courses to offer additional sessions of the course during the current or future term.
- *One-time Lectures and Lecture-style Courses* – The main reason wait lists occur among OLLI lecture-style courses is the lack of adequate classroom space to accommodate all who register. This problem has largely been confined to Tallwood and, until recently, involved primarily enrollment issues among the largest classes. The Executive Director and staff have been able to correlate most Tallwood course registrations to existing campus facilities by juggling program schedules. Because TA-1 is the only classroom available for larger lecture classes, the Executive Director and staff has had to make course-by-course, semester-by-semester decisions on whether to arrange off-site classes for significantly over-booked courses (i.e. requested enrollment ranging from 100-200) or manage large wait lists for some or all of those courses. Many factors have gone into those decisions, including the availability of funds for off-site facility rentals, availability and appropriateness of off-site

locations (distance from Tallwood and other off-campus sites, parking, physical accessibility, staff to coordinate off-site activity).

**3. *Current registration and enrollment procedures may over-estimate the need for wait lists.***

As indicated in the introduction to this report, the current practice of comparing registration requests to classroom capacity as the basis for creating wait lists may over-estimate their need. The Ad Hoc Work Group believes that the practice does not take into account often-reported situations in which members decide not to attend courses for which they are registered and drop courses without notifying OLLI staff. These actions result in under-utilization of OLLI facilities and empty seats that could have been assigned to, and filled by, those on wait lists.

Work Group suggestions to the Executive Director regarding the bases for determining course enrollments and the need for wait lists are presented in the final section of this report.

**4. *Until recently, OLLI has effectively kept pace with membership growth and demand for services, thereby effectively managing the size and number of wait lists each term.***

Since its inception, OLLI has had to create and manage wait lists for courses and other activities that are over-subscribed during registration. Indeed, the continuing need for wait lists represents an unintended consequence of OLLI's success. We attract, engage, and retain members. Until the two most recent registrations, Summer and Fall 2013, OLLI appears to have been able to manage and limit wait lists and generally keep pace with membership growth and program enrollment demand utilizing mostly on-site classroom facilities. Over the years, OLLI: 1) expanded the number and nature of courses and activities offered each term 2) opened two additional campuses to accommodate growing membership and program enrollments; 3) scheduled courses in ways that made maximum use of on-site classrooms and that limited the need to conduct courses off-site; and 4) invested in technology that is beginning to facilitate multi-room and multi-site participation in lectures and other course offerings.

**5. *The most recent OLLI registrations for Summer and Fall 2013 were conducted successfully amid unique and difficult institutional circumstances. In addition to dealing with those circumstances, an interim executive director and staff had to find ways to address extraordinary enrollment and wait list challenges resulting from exponential growth in OLLI membership, registration, course requests and facility limitations – issues that are likely to be with OLLI for some time.***

It appears that the first wave of Baby Boomer retirements has swept over OLLI with dramatic affect. In two years membership has increased from approximately 900 to more than 1150 with new members signing up almost every day. Registrations for Summer and Fall 2013 both exceeded 1100 for the first time. Registrations involving more than 1100 members have begun to swamp capacity projections for many large and small courses alike and will require both short and longer-term enrollment and facility solutions in order to keep pace with growing service demands. As a start, during the Fall 2013 registration, the Interim Executive Director and staff juggled course schedules to make maximum use of Tallwood on-site classrooms and were still required to move 13 significantly over-subscribed lectures and lecture-style courses to available

off-campus sites in order keep the size and number of wait lists within reasonable and management limits. The Group notes that the number and size of wait lists not only affect member access to courses, but also add to the work of already stretched staff who monitor and manage course enrollments and wait lists on a continue basis.

### **Suggestions for Consideration by the Executive Director**

1. *Continue to think and act strategically regarding registration and wait list issues.*

The Work Group applauds the Executive Director's approach to addressing registration and wait list issues in the broader context of finding immediate and longer-term ways to best match the service needs and desires of a growing OLLI membership with appropriate resources and facilities.

2. *Continue to focus on the many roles OLLI plays in the lives of its members and seek balance among them in your decisions and actions.*

As the Executive Director is well aware, seniors join OLLI and participate in programs in order to meet a number of personal needs, including educational or personal enrichment, recreation, social engagement and companionship, relief from caring responsibilities or other family obligations, sharing knowledge and experience, and/or just plain staying active. Although the Executive Director will not be able to address every need in every decision, we know she will take into account as many as possible. A case in point is the recent decision during Fall 2013 registration to locate 13 Tallwood courses off-campus in order to avoid significant wait lists and better respond to member course requests. Available sites with adequate parking and classrooms were found and rented quickly. Even though most wait list problems were solved by this action, several long-time OLLI members who look to OLLI for social engagement as well as enrichment, especially at Tallwood, expressed displeasure and disappointment over losing an opportunity to socialize between classes.

As it is likely that more off-site courses will be needed in the near future to meet enrollment requests, the Executive Director might wish to consider identifying and securing *one* facility near Tallwood in which to hold most, if not all, off-site courses throughout the week. Budget permitting, locate a staff member at that site to oversee OLLI activities. Arrange a space for members to meet between classes for conversation, coffee and cookies.

3. *For lectures and lecture-style courses, explore the possibility of basing enrollment decisions on data-supported projections of course participation rather than on comparing course registration to classroom capacity.*

As discussed in an opening section of this report, the Work Group would like to have been able to assess the value and consequences of basing course enrollments and the need for wait lists on data-supported projections of course attendance rather than on course requests. To test the Group's hypothesis that actual class attendance is routinely lower than class registration, we suggest that the Executive Director experiment with "overbooking" some or all OLLI classes for one or more terms. A test overbooking rate, for example 15%, could be established based on a

review of past sign-in sheets for selected courses of varying size. Such a review could be conducted by member volunteers and provide solid base-line information on which to set enrollment levels above classroom Fire Code requirements. We note that Fire Codes limit the number of people actually in a room, not the number invited or authorized to enter it. While the suggested experiment will take time and effort, including monitoring to make sure classes are indeed not over-attended, we believe that it might result in tighter facility use, reduction in wait lists, and cost control (possible reduction in the need for and number of courses conducted off-site in rented space).

4. ***Explore ways to improve access to popular reoccurring OLLI special events with enrollment limits that far exceed membership demand***

We suggest that the Executive Director consider special registration options that could improve member access to reoccurring special events, such as limited-space semester field trips to the Supreme Court, or hands-on technology instruction. An option discussed by the Work Group is a *Rolling Event Registration* that would enable members to sign up once for such events and remain on an active wait list from one term to another until they are reached and enrolled. Currently, members compete *de novo* every term for admission and may never be selected by the computer-generated random process.

The Ad Hoc Work Group welcomes the Executive Director's questions and comments. We stand ready to assist her, collectively or individually, in any way that might be helpful.