

## **Report on Town Meeting: OLLI at the Crossroads**

Osher Lifelong Learning Institute at George Mason University

November 4, 2005, 10 – Noon

Tallwood

Approximately 100 members attended the first ever OLLI Town Meeting organized by Deborah Halverson, Eileen Duggan, Charles Duggan and Rickard Chobot, with help from the Membership and Hospitality Committees.

### **Panel of OLLI Committee Chairs**

**OLLI President Charles Duggan** opened the session and introduced a panel of committee chairs; each spoke for five minutes.

**Development Committee Chair Eileen Duggan** thanked members for their financial support. The committee was formed in the late 90s with Bob Bohall as the first chair to develop outside funding sources and manage the Friends of OLLI campaign. Outside fundraising was quite limited before the committee discovered the Bernard Osher Foundation. However, the backbone of fundraising efforts is OLLI members through the Friends of OLLI. Many members responded to the recent solicitation and others included a donation with their registration form. These funds enable OLLI to maintain and upgrade audiovisual equipment and provide for three modest scholarships to George Mason University. The scholarships are part of the support OLLI gives to GMU under the terms of the current affiliation agreement. Some 24 percent of members make financial contributions over and above their dues, which is a very high percentage. The committee plans to list the names of annual contributors in the social room unless they choose to remain anonymous.

**Program Review Committee Chair Kathryn Russell** described how she and fellow committee members Bob Bohall and RoseMary Gustin moved from their original charge of assessing the program to planning the winter term program after Carol Ferrara's departure. The November 7 issue of *OLLI News* includes some highlights of upcoming winter term courses. The committee is now working with Executive Director Dick Chobot on the spring program, new program ideas and on creating a database of sources of instructors. Kathryn encourages submission of ideas for subject areas, potential teachers and member likes and dislikes.

**Publications Committee Chair Gordon Canyock** said the committee's role is communication, to get information out to members from the Board, staff and committees, and to get feedback from members through letters to the editor and Ms. Ollie Ettakit and Question of the Week features. As a cost-cutting measure, he is seeking to further reduce the number of printed newsletters (cost per issue is 25 cents) in favor of the *online OLLI E-News*. He asked for input on whether members want feature articles in the print version or just announcements, and whether the Membership Directory pages listing members by zip code are useful.

**Facilities Committee Chair Ben Gold** has focused on four areas in the six months he has chaired this committee.

- Classrooms: Three new classes had enrollments of well over 100 students, requiring the rental of Christ Lutheran Church. While not an ideal facility, it was available on short notice. He said OLLI needs more space at the main campus and better space in Reston. He is negotiating on other Reston space.
- Parking: It has taken work and time to get the swimming pool to put temporary patches on holes in their parking lot adjacent to Tallwood. Next year they plan to re-dig the pool with the use of heavy equipment. Following this, they plan to completely redo the parking lot.
- Audiovisual equipment: ED Dick Chobot is now responsible for classroom equipment. There have been problems; Dick has a plan to address the needs.
- Landscaping: Valerie Braybrooke and her “dirty knees” crew have done a fabulous job on the Tallwood grounds. (Spontaneous applause broke out in appreciation.) Valerie’s next phase will improve the area behind the building.

**Finance Committee Chair Don Yesukaitis** brought some copies of the outside auditor’s report as well as budget data through October. For the past 3 or 4 years OLLI has had outside audits done and received the highest level of report. Don said OLLI is in a good cash position but noted there will be no additional income until further dues come in next year. He said a few years ago the Board established a contingency fund of \$50,000 to be used in the event of a true emergency. He reiterated the report on the Osher funds as described in a recent *OLLI News* issue. The Osher funds go to the GMU Foundation for OLLI’s use. The GMU Foundation does the accounting. Approximately \$80,000 of the first year Osher funds was used for capital improvements; the remainder will be used to remodel the Tallwood office. The second Osher grant received this summer is being used for the first year of the executive director’s salary and benefits. The committee is working with the ED on the 2006 OLLI budget. A draft will be discussed at the November Board meeting; members are welcome to attend and ask questions. It is expected that the Board will vote on the budget in December.

**Long-Term Planning Committee Chair Pat Carroll** said previous long-term planning had focused on facilities. Now the committee is working with the ED on a comprehensive five-year plan or vision. Where do we want to be in five years? Dick Chobot is putting together an instrument for getting all Board members’ thinking; member input would be welcomed. Should OLLI programming be further decentralized or move into distributed learning? For instance, the McLean Community Center has asked OLLI for some limited programming there. Should OLLI explore distance learning? It would reach more people but with less social interaction. The committee is just beginning to ask such questions.

**Reston Support Committee Chair Abbie Edwards** introduced Ann Youngren, the new Administrative Assistant at the Lake Anne facility in Reston.

## Question and Answer Session

Questions asked by members and responses provided by OLLI officers or committee chairs are summarized here in the order in which they were asked.

Is the need for more facilities at Tallwood mainly to accommodate mega-classes? At the current time, yes.

Does the GMU Foundation charge a fee for handling the Osher grants? For the first two grants, no; for handling investment and accounting for the \$1 million endowment, probably yes. The funds have not yet been received, so details are not yet known.

Why not cut off enrollment in mega-classes and not use outside space? OLLI would prefer not to cut off member access to popular classes.

What is the size of the current membership? Approximately 690.

What does distributed education mean? Classes held in places other than campus locations.

How has OLLI predicted mega-classes? OLLI has data on previous enrollment patterns, thanks to Board member Pat Cosslett. For new classes, it's harder to predict. Even if a new class is on a hot topic, it's hard to know whether it will attract 80 and fit in TA-1 or whether it will attract 150 and need other space. Rod Zumbro noted that the new Question of the Week relates to mega-classes and offsite locations; he urged members to respond.

What are current personnel plans; will the staff expand? Not at this time. Anna Hartmann will move into registrar duties. A new financial assistant will be hired. On program development, ED Dick Chobot will take on the conceptual work and will hire a part-time program assistant.

If OLLI grows, where will we put people? What are GMU's plans? Charles Duggan said that GMU now understands that OLLI helps them provide a service to the community with very little effort on GMU's part. They provide facilities and moral, but not administrative, support. GMU is now planning a twin-tower community for those 55 and older on university land; plans would include space for OLLI and for the GMU Theater of the First Amendment. Much is unknown about these plans, including timing.

A member who suffers from macular degeneration was thrilled to find OLLI when she moved to Reston two years ago. She can't drive and feels the "gems" of the program are at Tallwood. She would like to see organized carpools. Those who pay full dues deserve equal access to all programs. Abbie Edwards noted some instructors, including GMU faculty, are reluctant to come to Reston. Reston includes a smaller number of members, so the number of classes is smaller. She has offered carpools and has had few takers.

Others offered rides, or commented that better facilities might attract more members, or distance learning or teleconferencing might help those who could not drive.

ED Dick Chobot said that he has been exploring distance learning through technology. If costs prove feasible, he expects to bring a proposal for distance learning to the Board early next year.

### **Discussion Group Session**

Debbie Halverson explained that each small discussion group would use twenty minutes to explore one of ten questions developed and posted in advance. Approximately 70 members participated in the group discussions. Group leaders were drawn from the Membership Committee, the Board and the general membership. Each group leader reported to the whole group on discussion results.

1. *If we were to broaden our program, what three new subject areas might we add?*

This group boiled 27 suggestions down to three:

- Senior health and aging: current developments in technology-- where to go to find information, services and facilities, especially via the net;
- Beginning language lessons, especially Spanish; and
- Beginning bridge.

2. *If OLLI facilities were available on Fridays and weekends, what kinds of programming or events would interest you? E.g. film series, etc.*

This group had several suggestions;

- Continue the regular format;
- Activities offsite – overnight trips, special events;
- Singles’ activities that are entertainment;
- More entertainment rather than intellectual activities;
- Single-shot talks by experts;
- Social luncheons offsite;
- Outdoor activities; and
- Conduct an email poll to assess interest.

3. *If you were asked to make a financial contribution to OLLI and had a voice in how the money would be used, what projects would motivate you to give?*

This group listed suggestions and ideas:

- More information about OLLI scholarships and other uses of Friends of OLLI contributions in the past;
- Most in group were OK with unrestricted giving;
- Projects for offsite rental of space for mega-classes; and
- Program development projects.
- Idea: Earmark money for those who are potential members but could use financial help (OLLI does this but it’s not well known); and
- Idea: Consider reduced tuition for couples.

4. *Like other LLIs, each year OLLI typically loses 25% to 30% of its membership as people relocate, become ill, etc. To sustain itself, OLLI must continually recruit new members. What are some new strategies we might employ to maintain our membership base?*

This group said some of its suggestions are already being used by OLLI:

- Speak to groups, bring catalogs and other information to them;
- Put information on bulletin boards in retirement homes and supermarkets;
- Get information into local newspapers;
- Leave information in libraries;
- Public schools have a website; post information in a section for retirees;
- Get information into newsletters for synagogues and churches;
- Get information onto the Jewish Schmooze website;
- Organize a system for carpooling;
- Distance learning might help;
- Consider buses from retirement facilities to OLLI; and
- Encourage word of mouth, the best recruitment tool.

5. *In an effort to go beyond simply serving our own membership, name three ways in which OLLI could contribute or give back to the community or the university.*

This group suggested:

- Tutoring students (all levels) in subject areas, particularly in situations where finances are a problem;
- Volunteering – checking into opportunities where volunteers are needed in the community and doing it as an OLLI effort, such as literacy programs in detention centers, or in hospitals; and
- Continuing to support the arts at GMU.

6. *What, in your estimation, are five reasons members value and continue to invest their time and money in OLLI?*

Due to space limitations in TA-1, no group discussed this question.

7. *We are reaching the limits of our capacity at Tallwood and are aware of uncertainties about our future ability to offer classes at the Reston facility. Please list three suggestions about how to deal with these problems.*

This group came up with:

- Look at schools that are not being used;
- Types of facilities that may have space available during the day include churches, movie theaters, community centers, fire stations, corporations, hotel meeting rooms, lodges and country clubs; and
- GMU facilities (fieldhouse).

8. *In an effort to cut down the number and therefore the cost of the print version of OLLI News, list three steps we might take to persuade members to rely on OLLI E-News as their primary source of information about OLLI activities.*

This group had suggestions for both the *OLLI News* and the Membership Directory:

- Don't print the newsletter (or print a small number);

- Distribute the print version even later than the online version;
- Make the print version available in only one location such as the social room rather than in each classroom;
- Discussion here at the Town Meeting will cause people to stop picking them up if they don't need them;
- Publicize the fact that *OLLI E-News* appears on Friday;
- The listing by zip code in the Membership Directory is not needed by each person;
- Print the Directory only once a year with an addendum update at midyear; and
- Finally, many want chocolate chip cookies!

9. *Since OLLI and all LLIs depend heavily on volunteers to sustain their existence and activities, name three ways we could persuade our non-volunteering members to participate more actively in the ongoing work of running OLLI.*

This group, whose leader estimated about ten percent of members currently volunteer, came up with three ways:

- Periodically publish requests for volunteer needs in *OLLI E-News*. This would ease the need and let members know how easy volunteering can be, and not threatening. Add a big "Please respond" to the appropriate person or committee.
- In *OLLI E-News*, offer a description of an ongoing volunteer job, such as at the front desk in the office; spell out the duties as in the *Member & Volunteer Handbook*;
- In the Catalog on the registration page (on the back below the bus signature or on a tear-out half page) put the list of volunteer opportunities with a checklist. Opportunities could be separated by the following – committees, print and AV assistance, fix-up and keep-up, assistance to committees, outside Tallwood, etc. Anyone checking an item could be followed up with or referred. Committees are listed but not everyone looks there when registering. Putting lists in the social room once a month with "please help" might spark some results. Reston could decide how to get this done any way they want.

10. *The essence of OLLI is the variety and quality of its courses. We believe that many of our members who are as yet not teaching are qualified with experience and knowledge on specific topics to do so. List three ways we can identify potential teachers and persuade them to share their expertise.*

To identify potential teachers:

- On the registration form ask for more information, such as education, vocation, avocation, that might help identify potential teachers;
- Talk to people about teaching; and
- In *OLLI News*, Identify areas of interest and ask for volunteer teachers in that subject area.

To persuade members to teach:

- Let members know OLLI will provide support for teachers;
- Set up a member group to help potential teachers with PowerPoint presentations or other presentation technology; GMU students may be helpful;
- Develop a handbook for OLLI teachers;

- Conduct a workshop and provide training for teachers; and
- Suggest team teaching.

The Town Meeting concluded with the award of door prizes; winners were drawn from a basket of meeting registration forms. Attendees enjoyed refreshments provided by Sandra Driesslein and the Hospitality Committee.

Submitted by Carol Henderson, OLLI Secretary