

Comments on the 2022 OLLI National Convention

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Summary

The 14th annual Osher Lifelong Learning Institutes National Conference was held April 25-27 at the OMNI Interlocken Hotel in Broomfield, Colorado. Board member Zachary Teich and I attended the event. The conference featured excellent speakers and great networking opportunities for the 125 OLLIs across the country to learn, share best practices, and collaborate. Over the three-day conference, we covered topics such as fundraising, effective marketing techniques, diversity, equity, inclusion, and collaborating with retirement communities.

Our benefactor, Bernard Osher, and Osher Foundation President Mary Bitterman provided words of encouragement. During the opening session a contest consisting of OLLI “Woo Hoos” was conducted to highlight OLLI events, ideas, and programs across the network. In the first round of winners, OLLI Mason gained recognition for its innovative “Caste,” an eight-week course coordinated by Terri Feldmayer and Gloria Loew of the Humanities and Social Sciences program planning group. It was the selected winner! The prize was an iPad, to be added to our technology inventory for use in our classrooms.

Fundraising expert Diane Lebson, co founder of Evergreen Philanthropic Solutions and author of *For a Good Cause*, addressed the group. Ms. Lebson’s presentation “Raising money you need for the critical work you do,” spoke about donor engagement. Dr. Louise Aronson MD, MFA, Professor UCSF Division of Geriatrics and author of *Redefining Aging, Transforming Medicine, Reimagining Life*, spoke about ageism and the perceptions we have about words that define age.

Plenary Sessions

- Welcome session: NRC Executive Director Steve Thaxton provided interesting statistics about OLLIs across the country. Many have seen dramatic drops in membership due to the pandemic and all are working hard with innovative efforts to bring members back to pre-pandemic levels. One significant report indicated fundraising averages contributions across the network is up 15.7%! 111 planned estate gifts have been funded or received to date and 114 planned or estate gifts have been pledged in future with 67 institutes reporting some of these gifts. Our benefactor, Mr. Bernard Osher and Osher Foundation President Mary Bitterman provided words of encouragement. During the session a contest consisting of OLLI “Woo Hoos” was conducted which highlighted OLLI events, ideas and programs across the network. In the first round of winners, OLLI Mason gained recognition for its innovative “Caste” course and was the selected winner! The prize was an iPad, which can be used by our OLLI in any way we see fit.
- Featured speaker: fundraising expert Diane Lebson co-founder of Evergreen Philanthropic Solutions and author of *For a Good Cause*. Ms. Lebson’s presentation “Raising money you need for the critical work you do,” spoke to donor engagement in a time when world events such as the pandemic and the war in Ukraine are motivating giving. She encouraged OLLIs to think in terms of seeking legacy gifts and finding focus on the impact those funds can have in increasing wellbeing in our own communities. She suggested each OLLI court donors and ask

them what is important to them—make notes in a meticulous way and work on the “long game” of being aware of those specific wants to meet OLLI needs. Finally, she suggested purchasing a CRM (customer relationship management) software program and forming a giving campaign specifically targeting donors invested in the organization.

- Featured speaker: Dr. Louise Aronson MD, MFA, Professor UCSF Division of Geriatrics and author of *Redefining Aging, Transforming Medicine, Reimagining Life*, which was a finalist for the 2020 Pulitzer Prize for general nonfiction. Dr. Aronson spoke about ageism and the perceptions we have about words that define age such as “old” and how these words are somehow deemed not as worthy as words such as “young” and that the devaluation of older adults is perpetuated by the negative perception of aging. She advocates for challenging and reformulating such perceptions to show worth.
- Featuring several OLLIs that successfully found collaborative ways to work together, “Working Across OLLI’s: The Spirit of Collaboration” some take away ideas: 1) Consider partnering with neighboring OLLI chapters on specific programs; 2) Pool resources with neighboring OLLI chapters to jointly buy ads on local media publicizing OLLI and seeking members. 3) Consider creating a “landing page” on-line for use of all OLLIs in your geographic area.
- Closing session. The closing session concluded with an overview of the many excellent presentations which were offered during the conference as well as the many networking opportunities each of us made.
- See below, for “Some Themes” additional thoughts and notes on some of the breakout sessions.

Some Themes

- Have a town hall to present the new strategic plan. Give it to your university partner and seek their opinion. Put implementation of the strategic plan on the agenda of each Board meeting and on the Annual General Meeting agenda as well.
- Coping with change was a major theme. OLLI has shown resilience in the way it coped with COVID (going to zoom quickly and successfully). Now it must change again as we find a ‘new normal’ living with COVID in the background.
- Keeping membership informed and engaged in planning and implementing change is vital.
- Use small in-person social events to help members become comfortable with returning to IRL (in real life, as opposed to zoom) interaction.
- Mid-sized OLLIs (such as ours) should consider tours and foreign travel as recruitment and fundraising tools. Collette (a large travel agency) gives 10% of fees it receives back to the sponsoring OLLI chapter.

- Don't use a tiered dues structure based on in-person vs. zoom participation. Giving a discount for zoom only membership will be a disincentive to returning to the classroom.

Breakout Sessions

- Fundraising: 1) OLLI offers “capacity building grants - \$25,000 up to 5 times in a chapter’s life. Use them to finance fundraising activities. 2) Environment for fundraising becoming more difficult as donors shift away from funding anything given global insecurity in general, and specifically the “coping with COVID” basket. Donations to charity also falling due to stock market decline and rise of competing funding priorities such as election-related interest groups. 3). OLLI chapters should stress organization’s role in helping people connect in the ‘new normal’ after the pandemic. To do this, focus programs on issues that give people the ability to express views on hot-button issues such as COVID, Ukraine, diversity, and the economy. 4) In seeking donor funding, stress how your OLLI chapter can help the potential donors attain their objectives by funding your activities.
- Effective Marketing Techniques:
An effective marketing strategy is integral to an OLLI’s achievement of both business and programmatic goals. The most effective marketing strategies are those, which incorporate creative, measurable, and efficient techniques and events. In this session, six Osher Network leaders shared inventive ideas that proved successful at their OLLIs . 1) The session opened with an overview of the OLLI Marketing Toolkit—a product with ads, digital, video and print which are editable and usable by all OLLIs for outreach purposes. 2) Stoney Brook University shared a fun restaurant collaboration for OLLI members to drive by and pick up a 3-course meal at a reduced rate, support a restaurant in need and support OLLI. The fundraiser was especially helpful during the time of social isolation due to the pandemic. OLLI members returned to their homes to a Zoom session for a cocktail demonstration and discussion with the restaurant chefs where they shared recipes with “secret ingredients.” 3) OLLI Mason shared the progress and success of our AARP collaboration, which included free marketing print and digitally to both local and national audiences. Our collaboration has driven more traffic on our YouTube channel, improved recruitment of new members, expanded our branding, and imprint for future members. 4) University of Nevada shared progress on a grant received from their area agency on aging for \$100,000 to enhance its online program so that we can reach seniors in rural Nevada. The grant proposal will be shared with all OLLI directors. 5) University of Washington shared its COVID recovery action-marketing plan after losing more than half of its membership during the pandemic. UW utilized Facebook ads, NPR radio ads and TV spots to bring awareness to the local community and revitalize its membership numbers. 5) University of Nebraska-Lincoln shared a successful “Showcase” of instructors, which took place at a local hotel. The full day event featured several “mini” course sessions, which gave attendees a “taste of OLLI.” The event was advertised widely. The campaign brought in hundreds of new members.

- Diversity/Equity/Inclusion: 1) Put together a study group within your OLLI chapter to examine ways to increase DEI. Keep in mind that there are several forms of diversity – racial/ethnic; socio-economic; people who are differently abled; LGTBQ. Don't be “clueless and condescending” in dealing with them. 2) Develop a DEI action plan, and get broad buy-in for it in the Board and among the membership. 3) Beware of the pitfalls of unconscious racism/sexism/ageism etc. Get sensitivity training; get advice from your chapter's University diversity office; consider hiring a DEI consultant.
- Collaborating with Retirement Communities, Assisted Living: OLLI at University of North Texas shared their work providing OLLI programming to Active Adult Community, Assisted Living Community, 3 Senior Centers in different towns, a Planned Community and a Premier senior living community. UNT has had success receiving substantial (100K+) for programming collaborations. UNT will share their information/proposals with all OLLIs.