
**OLLI AT DUKE
STRATEGIC PLAN
2016 - 2018**

**Approved by the
OLLI at Duke Board of Advisors
November 16, 2015**

Preface

OLLI at Duke University continues to be one of the premier life-long learning programs in the country. We now have over 1900 members and our fall and winter catalogs are enriched by more than 130 courses. This kind of success does not just happen by chance. It is the result of the dedicated effort of hundreds of volunteers, instructors, and members led by a very small staff from Duke. We enjoy our current success because of the planning and accomplishments of those who have been in leadership positions before us. It is our obligation as current leaders of OLLI at Duke to carry the work forward to insure that we remain a premier destination for life-long learning in the future.

Strategic Planning at OLLI at Duke has been in place for over a decade. We have had three prior strategic plans that covered the period through 2014. Much of what we enjoy today came directly from those plans. In 2014, the Board of Advisors asked the Strategic Planning Committee to draft the next step in the succession of plans covering the years 2016 to 2018. After a year of intense effort, the Strategic Planning Committee provided a draft document to the Executive Committee of the Board of Advisors in April of 2015. With the acceptance of that document, the work of the Strategic Planning Committee was complete. The next steps in this planning cycle now belonged with the Executive Committee and the Board of Advisors.

Our past strategic plans have identified several critical issues that continue with this plan including space and facilities and maintaining a strong curriculum. But the Strategic Planning Committee has also identified several new issues that have grown in importance as OLLI at Duke has grown. These issues include nurturing our volunteers, building a stronger social network, and enhancing our visibility in the communities we serve.

The Executive Committee has taken the draft proposed by the Strategic Planning Committee and revised and reformatted the plan to provide continuity and alignment with the format of the prior two plans. In that way, we can more easily see the progress on continuing issues as well as focus our energies in similar ways on the emerging issues identified by the Strategic Planning Committee. This document is the results of that effort.

Many OLLI at Duke members have been involved with the development of the 2016 to 2018 Strategic Plan. All of them have given their best effort to see that OLLI at Duke continues on its current leadership path. For this, the Executive Committee of the Board of Advisors gives their sincere thanks.

Gregg McPherson, Ph.D.
President, Board of Advisors
OLLI at Duke

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I) Introduction

Strategic Plans have been an integral part of the management of OLLI at Duke for many years. The previous plan, covering the years 2012 – 2014, served us well and stimulated significant progress in a broad number of areas (see Section II below).

In early 2014, under the leadership of Phil Baer, the Strategic Planning Committee (SPC) began an effort to update the plan for the next three years. This work continued in 2015 under the leadership of Mary Alexion. In May 2015, the SPC delivered a draft of this plan to the Board for its consideration. This draft was then modified by the Executive Committee, culminating in Board approval of the current plan in November, 2015.

II) Background & History

The Osher Lifelong Learning Institute at Duke University (OLLI at Duke) was founded in 1977 as the Duke Institute for Learning in Retirement (DILR). In 2004 we became a member of the Osher Lifelong Learning Institute and changed our name to “OLLI at Duke” in 2005. Over the years, our membership has grown from 42 members in 1977 to over 1,900 in 2015. The number of classes we offer has grown as well and today we routinely offer more than 300 courses every year.

In the time since the previous Strategic Plan was developed in late 2011, significant progress has been made on many critical issues:

• Space & Facilities

- We formed a Short and Long Term Facilities Sub-Committee of the SPC to study ways to address our need for better facilities.
- We added Monday class space to our Judea Reform Congregation (JRC) lease, allowing us to offer 20 additional class sessions per week.
- We secured authorization to use an additional on-campus parking lot near the Bishop’s House.
- We created an inventory of potential external classroom and office space that could be used to support future growth.
- We presented a case study on our space and facility needs to Duke Administration in April 2014. As a result, former-Dean Patton appointed a high level committee to further assess OLLI at Duke space and facility needs, and to make recommendations for how those needs will be addressed.

• Curriculum

- We began offering evening and weekend classes on a limited basis.
- We began to recognize long-term instructors by presenting Certificates of Appreciation to instructors who have taught 25 and 50 times at OLLI.
- We introduced an on-line Course Feedback System and used it to gather student feedback.

• Technology

- We created a member website to provide more information to members.
- We upgraded our classroom multimedia systems in JRC and Bishop’s House.

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- We encouraged members to use our on-line system to register for courses and events. By Fall 2015, over 82% of registrations were done on-line. Throughout this period, we dealt with implementation issues as they occurred.

- **Finance**

- We made it easier for our members to contribute to OLLI by putting “Donate On-line” and “Donate by Mail” buttons on both the member website and the Duke Continuing Studies website.
- We initiated a giving campaign in 2014 focused on raising funds for our new classroom multimedia equipment and raised in excess of \$18,000.

In addition to activity specifically related to critical issues, we made progress on many other fronts:

- We celebrated our 35th Anniversary in 2012 with a gala celebration attended by more than 300 members and guests. Dean Laurie Patton was our keynote speaker and the national OLLI program director, Kali Lightfoot, attended as well.
- We conducted member surveys in 2012 and 2014 and used this feedback in our planning. We committed to conduct member surveys every two years.
- We raised our profile within the lifelong learning community by delivering two presentations at the Southern Regional Conference in 2013, and three in 2014.
- We modified our committee structure to better address our evolving needs. During this period we created one new committee (Volunteer Relations), combined two committees (Activities + Membership) and disbanded two committees that were no longer active (Information Technology and Finance).
- We rewrote our Bylaws to better reflect our needs. These Bylaws were approved by the membership in April 2015.
- We conducted our first “Volunteer Celebration” in 2015 which we hope will become an annual event. Over 150 volunteers and their guests attended.

At the same time, a number of changes occurred at Duke which could have significant impact on OLLI at Duke in both the short and long-term:

- Laurie Patton, who was appointed the Dean of Arts and Sciences in 2011, later left Duke; she was replaced by Valerie Ashby in mid-2015.
- Sally Kornbluth was appointed Duke Provost in 2015.

III) Key Stakeholders

Key Stakeholders for the OLLI at Duke 2016 – 2018 Strategic Plan are:

- OLLI Members,
- OLLI Instructors,
- The OLLI Board,
- OLLI Committee Members and Chairs,
- The OLLI Staff,
- Duke Continuing Studies and Summer Session,
- Duke University, and
- The Osher Foundation.

IV) Purpose, Values & Aspirations

a) Our Purpose

OLLI at Duke seeks to engage the minds, elevate the spirits, and foster the well-being of its members through a wide range of educational programs and opportunities for volunteer service, travel, and social activity. We exemplify Duke University's commitment to community service and lifelong learning through our collaborative work with academic and professional groups, area retirement centers, various research projects on aging, and other institutes for learning in retirement.

b) Our Values

- **Lifelong Learning** – we believe that learning is a lifelong undertaking and should be a natural development process that is not interrupted by age.
- **Respect for the Individual** – we recognize and appreciate the intellectual curiosity and knowledge that each individual brings to our organization.
- **Quality** – we aim for excellence in all our endeavors.
- **Diversity** – we welcome all to join us and we celebrate the diverse backgrounds and experiences that our members bring to the OLLI community.
- **Fulfillment** – we seek to attain a high level of satisfaction among our members regarding our courses and activities, contributing to the overall quality of our members' lives.
- **Affordability** – we strive to ensure that our courses and activities are affordable for our members.
- **Reputation** – we seek to be known as an organization that is energetic, enthusiastic and passionate about learning.
- **Community Service** – we recognize the importance of serving our communities.
- **Joy of Learning** – we believe that sharing new knowledge and experiences with others is an enjoyable and fulfilling experience

c) Our Aspirations for the Next 3 – 5 Years

Our Vision defines our aspirations for the next 3 – 5 years. Three overarching goals define our vision:

1. **OLLI will be a premier lifelong learning program** that provides its members innovative, interactive, and transformative offerings that address their intellectual, physical, and emotional needs. Our programs will be well attended and well received.
2. **OLLI will be an organization** that offers opportunities for
 - Intellectual development,
 - Social interaction,

- Support for members as they transition through periods of their lives,
 - Belonging to a community that provides a sense of family and connectivity.
3. **OLLI will grow at a sustainable rate** that does not sacrifice quality and is consistent with key capabilities:
- Curriculum / instructors,
 - Facilities,
 - Staff and volunteer support,
 - Financial support.

V) Assumptions Regarding OLLI Membership and External Environment

The assumptions from the 2012 – 2014 Strategic Plan were reviewed and found to still be valid and complete. These assumptions are:

- a) Our operational costs will increase at rates approximating overall rates of inflation.
- b) Membership and course enrollment will increase at approximately 3 - 5% per year, a growth rate which is consistent with recent history.
- c) Other local OLLIs will expand and may compete with us for members and / or offer opportunities to collaborate and further develop our programs.
- d) Members of newer generations, the Baby Boomers and Generation Xers, will become a more significant percentage of our membership and may have different expectations of a lifelong learning experience. For example, many will be more technology-savvy and may thus expect our instructors to deliver course content using methods different from those used currently.
- e) Technology will continue to evolve rapidly and in ways that are difficult to predict.
- f) More of our instructors will expect appropriate classroom hardware and software to deliver course content electronically.
- g) Demand for specialized classes (e.g., fitness, crafts, computers, cooking) will affect the nature of future classroom requirements.

VI) Membership Needs and Wants from 2014 OLLI Member Survey

A survey of OLLI members was conducted in 2012 and again in 2014. About 48%, or 800, of our members responded to the most recent survey, which gives us confidence that the results are indicative of our overall membership. Satisfaction with our program is high, with over 90% of respondents indicating that they are Somewhat Satisfied or Very Satisfied with their OLLI experience.

Detailed survey results were considered by the SPC in the preparation of this plan. A high level summary is also available in Appendix.

VII) Situation Analysis (SWOT)

a) Strengths

- 1) **Association with Duke University** – being part of Duke University, a respected and internationally recognized institute of higher learning, gives us credibility as part of an intellectually stimulating environment. Recently, OLLI has received increased

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- visibility within Duke as indicated by increased attendance of Duke stakeholders at our convocations, Duke colleagues speaking at OLLI events, and Dean Patton’s establishment of a task force to consider OLLI space needs.
- 2) **Association with the Osher Foundation** – being part of the OLLI national network gives us access to new ideas and the use of the OLLI “brand.”
 - 3) **Osher Endowment** – our endowment provides us with a supplemental income stream that allows us to keep member fees down while providing flexibility to try new things.
 - 4) **Reputation as a Leader in Lifelong Learning** – OLLI at Duke is recognized as a leader in lifelong learning locally, nationally, and internationally.
 - 5) **Association with Local Retirement Communities** – our association with local retirement communities (e.g., the Forest at Duke, Carol Woods, etc.) gives us visibility with a key demographic group and access to auditorium spaces for larger classes.
 - 6) **Association with the Judea Reform Congregation** – our lease with JRC allows us access to high quality classroom space with parking.
 - 7) **Broad Range of Excellent Classes** – we offer a broad range of well-received classes.
 - 8) **Excellent Instructors** – we have a large number of highly-qualified instructors who are willing to teach at OLLI either *pro bono* or for a small honorarium.
 - 9) **A Committed Group of Volunteers** – we have a diversely talented group of volunteers who are enthusiastic and willing to help.
 - 10) **Social Events** – we offer a broad array of social activities that permit members to interact with each other and establish friendships and relationships outside the classroom.
 - 11) **Membership** – we have a large, diverse, and educated membership strongly committed to lifelong learning.
 - 12) **OLLI Staff** – our staff members are capable, enthusiastic and committed to the goals of OLLI.
 - 13) **Location** – we are located in a geographic area that has a growing number of retirement-aged individuals interested in lifelong learning.

b) Weaknesses

- 1) **Space and Facilities** – many of our classes are overcrowded or over-subscribed, and one of our main classroom buildings (the Bishop’s House) is not suitable for our needs. Our facilities lack adequate classroom space and sufficient parking. Our options to upgrade our facilities are limited by our lack of capital funds and our reliance on Duke for basic services. The absence of a single, large OLLI at Duke facility limits our ability to build a sense of “community” among our members.
- 2) **Finances** – we have not developed major new sources of funding to support future growth.
- 3) **OLLI Staff** – in 2004, the ratio of members to full time staff was 1200 : 1.5; today the ratio is 1930 : 2. With this increasing workload, OLLI risks “burning out” staff

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- members which would negatively impact efficiency and service delivery and potentially increase staff turnover. OLLI's over reliance on volunteers to support our increasing membership levels, could place unreasonable demands on key volunteer positions, especially key committee chairs.
- 4) **Recruiting and Retaining OLLI Volunteers** – although we have a vibrant group of volunteers, the great majority of our members do not volunteer and our past efforts to get more members involved have been only partially successful.
 - 5) **Recruiting and Retaining Leaders** – it is difficult to identify new leaders, especially for Board and committee chair positions. We are overly reliant on a dedicated, but small, core group that carries much of the load. We are at great risk when we lose a key leader, especially an officer or committee chair.
 - 6) **Evaluating Instructor Quality** – although the vast majority of our instructors are highly regarded by their students, a few are not. This is especially true of new instructors with no track record of teaching at OLLI. While poor quality instructors are the exception and not the norm, we risk losing members because of dissatisfaction with a few poor instructors.
 - 7) **Lack of Transition Processes** – we are reliant on the knowledge and priorities of key OLLI leaders, especially committee chairs. When there is turnover, the incoming chair sometimes has to “start from scratch” with few records of what was done before, or how it was done. Some valuable efforts fall by the wayside when there is turnover and the incoming leader has different priorities or skills.
 - 8) **Lack of Diversity** – despite past efforts, we have not been able to achieve the level of diversity that is reflective of the geographic area from which we draw our members.
 - 9) **Online Registration System** – our online registration system has been viewed as “member-unfriendly” and unreliable by many members. While some improvements have been made, this remains an issue.

c) Opportunities

- 1) **New Members** – the growing pool of retirement-aged people in the Triangle area represents a growing number of potential new members.
- 2) **The Osher Connection** – being part of the OLLI network allows us to access good ideas and programs being implemented by other leaders in lifelong learning at a national level.
- 3) **Relationships with Other Local Lifelong Learning Institutions** – continuing our collaborative relationships with other lifelong learning institutions in the Triangle area may allow us to offer new courses and give us access to new facilities.
- 4) **Partnerships with Additional Retirement Communities and Organizations** – building relationships with additional retirement communities and organizations like AARP may provide us access to new members and facilities.
- 5) **Fund Raising among Our Members** – we have an opportunity to encourage contributions from our members.
- 6) **Fund Raising with Other Organizations** – we have an opportunity to encourage contributions from organizations other than the Osher Foundation.

- 7) **Technology** – evolving technology may present opportunities for us to enhance our support for instructors, to improve our administrative processes, to communicate with our members more effectively, and to allow members to more easily connect with each other.

d) Threats

- 1) **Local Competition** – the proximity of other local lifelong learning programs presents members and potential members with choices for their lifelong learning dollars.
- 2) **On-line Competition** – the availability of very high quality and very low cost on-line courses covering every imaginable topic “in the comfort of your home” coupled with emergence of a population that connects through social media may, over the long term, introduce a risk that they become an alternative to OLLI at Duke.
- 3) **Increasing Costs** – if increasing costs require OLLI at Duke to substantially increase fees, we may price ourselves out of the market for some members. Also, if unrelated costs for our members (e.g., gas, food, etc.) increase significantly, some members may be forced to reduce participation in OLLI courses and events.
- 4) **Loss of Access to the Bishop’s House or Judea Reform Congregation** – the loss of access to either of our main facilities for a long period of time due to fire, loss of lease, etc., would deal a significant blow to the OLLI at Duke program.
- 5) **Loss of Duke University Support** – the loss of Duke University support for OLLI at Duke would be fatal.

VIII) Critical Issues

To meet the overarching goals identified in Section IV, five Critical Issue areas have been identified:

- Space & Facilities,
- Curriculum,
- Volunteers,
- Social & Community and
- Organizational Visibility.

In each case, we have defined the issue, identified reasons that the issue exists, listed possible actions to address the issue, defined who will be responsible for managing the issue and identified how we will determine if progress is being made.

Detail on each Critical Issue is shown below:

a) Issue 1: Space & Facilities

The issue is...

- ... We are beyond capacity with our current classroom space.
- ... The Bishop’s House is inadequate (e.g., parking, restrooms, HVAC). This is our second largest facility, representing 690 or 30% of our available 2,300 seats per week, as well as offices and meeting spaces. These limitations are a source of frustration for many, reducing our ability to attract both new members and instructors.

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- ... Our current facilities and parking do not provide members adequate space for informal socializing between classes.
- ... We are dependent on leased space at JRC. Some members and instructors comment that while JRC is a good space, it is not “Duke.” They do not feel they are a part of the campus experience that they seek from OLLI at Duke.
- ... A substantial percentage (> 35%) of our classes are completely filled or waitlisted each term resulting in disappointed students and lost revenue.
- ... Committees and other organizational activities are limited in meeting space and often end up meeting in restaurants or member’s homes. These spaces lack the support resources such as easels, projectors / screens, and table space to hold productive meetings. This is especially true in the summer when the Bishop’s House is closed.

Reasons for the issue...

- ... The Bishop’s House is over 100 years old and was never designed for adult education. Despite past efforts to fix plumbing and HVAC systems, it will never be a suitable facility to meet OLLI at Duke’s needs. We must find other, more suitable space.
- ... Neither the Bishop’s House nor JRC has adequate parking to support all our classes and activities, including informal socialization. Additionally, the Bishop’s House parking lot is designated for Duke East Campus staff parking, decreasing available parking for OLLI members.
- ... To date, Duke has been unable to provide OLLI with alternative on-campus facilities.
- ... Our membership and class enrollments are expected to continue to grow at 3 – 5% per year.

Possible actions to address the issue...

- ... Short-term, we must maximize and improve the use of facilities *other than the Bishop’s House*, especially for classes.
- ... In the intermediate term, we must locate alternative facilities, either on or off campus. To this end, we have reactivated the Space Committee.
- ... Longer-term, we must help facilitate the procurement or construction of a new building to meet OLLI at Duke’s long-term needs.

Who will be responsible for managing this issue?

- ... The Director will take the lead role in managing this issue.
- ... The Space Committee and OLLI staff will assist as needed.

How will we determine if we are making progress on this issue?

- ... If there is improvement in our current space or we have secured new external space that more closely meets the needs of OLLI students, instructors and administrators.

... If periodic member and instructor surveys indicate a stable or increasing level of satisfaction with our facilities.

b) Issue 2: Curriculum

The issue is...

... Curriculum is the heart and soul of our program. We must maintain high quality and constantly refresh our course offerings to meet the changing needs of our members.

Reasons for the issue...

... The interests and needs of our members are constantly evolving, requiring new and different course offerings and methods of course delivery.

... As our membership grows, the number of courses we offer also must grow.

... Existing instructors “age out” or stop teaching for other reasons (e.g., illness, family, etc.) and must be replaced.

... The current course proposal management and catalog production system are antiquated and inefficient resulting in increased effort and a higher chance for errors in catalog production.

Possible actions to address the issue...

... Effectively recruiting new instructors from our new member cadre by promoting the value of teaching at OLLI at new member Meet & Greet sessions.

... Continuing to offer “prospective instructor workshops” several times a year.

... Measuring the effectiveness of current instructors, especially new instructors, using the Course Feedback System.

... Analyzing the reasons that good instructors stop teaching and addressing those issues when possible.

... Continuing to measure instructor satisfaction with our biennial Instructor Surveys.

... Reviewing instructor incentives, including the current honorarium system, and exploring non-cash incentives (e.g., free classes for instructors, enhanced Duke Library access, Duke Bookstore discounts, etc.).

... Asking OLLI members what courses interest them via surveys, focus groups, etc.

... Monitoring other LLI’s for good course ideas.

... Exploring changes in course length, course time and course locations.

... Researching, developing and/or purchasing more effective course proposal and catalog design and production tools.

Who will be responsible for managing this issue?

... The Curriculum Committee Chair will take the lead role in managing this issue.

... The OLLI Director, Instructor Relations Committee Chair and the Board will assist as needed.

How will we determine if we are making progress on this issue?

... If periodic member surveys indicate that our course offerings continue to meet the needs of our members.

... If we continue to recruit and retain new instructors.

... If we have identified and implemented improved systems for course proposals and catalog production.

c) Issue 3: Volunteers

The issue is...

... We have not identified a sufficient number of skilled and motivated volunteers to meet some of the specific needs of a large and growing organization with limited paid staff.

... Committee chair and board positions are difficult to fill quickly when an opening occurs. This can be disruptive, especially in the case of key leadership positions.

Reasons for the issue...

... We do not have a systematic process for identifying and supporting volunteers.

... We have not been able to provide clarity to volunteers regarding the type and length of commitment required.

... We have not adequately recognized the efforts of our volunteers in official and unofficial ways.

Possible actions to address the issue...

... Developing and listing well-defined job descriptions including level of time commitment expected for each position.

... Considering incentives for volunteering (e.g., free membership).

... Appointing a Board-level Volunteer Coordinator.

... Creating a volunteer mentoring process.

... Developing a robust recognition program for volunteers including an annual Volunteer Celebration.

... Provide training on how to appropriately recognize and support volunteers.

Who will be responsible for managing this issue?

... The Executive Committee will take the lead role in managing this issue until we have a well-established Volunteer Relations effort.

How will we determine if we are making progress on this issue?

... If we have a declining number of vacant positions.

... If we have an increasing number of members who volunteer.

d) Issue 4: Social & Community

The issue is...

- ... Long-term OLLI members have expressed that they no longer feel the same sense of community that they felt when it was a much smaller organization.
- ... OLLI now has over 1900 members and some new members have a difficult time meeting other people who share their interests.
- ... Many of our members do not feel a strong sense of belonging to the OLLI at Duke community and may be less likely to donate their time, talent and money.
- ... OLLI members have limited means of finding one another unless they meet in a classroom setting.

Reasons for the issue...

- ... The facilities at OLLI's disposal do not provide adequate space for socialization before or after classes.
- ... OLLI at Duke policies (e.g., the prohibition of coffee in the classrooms at JRC) negate the opportunity for casual conversations.
- ... Concern for maintaining member privacy have prevented the creation of a member directory.
- ... Older members feel lost in a sea of new members. New members feel lost in a sea of old members.
- ... A minority of members participate in OLLI social activities.

Possible actions to address the issue...

- ... Continue monthly member social gatherings to encourage community building.
- ... Encourage formation and support of more small communities within the larger OLLI community (e.g., language tables, craft groups, etc.).
- ... Explore the possibility of creating an opt-in member directory that can be shared among OLLI members.
- ... Expand the use of social media to enhance the OLLI online community.
- ... Review the policy prohibiting coffee in the classrooms at JRC.
- ... Encourage instructors to provide a break in their class to allow for informal socialization.
- ... Encourage more people to gather at local coffee shops after class.

Who will be responsible for managing this issue?

- ... The At-Large Advisor Committee will take the lead on this with the support of the Membership Committee.

... The Board and Director will support efforts that involve policy questions and resources.

How will we determine if we are making progress on this issue?

- ... If member opinions gathered by the At-Large Members show positive trends.
- ... If responses to the Biennial Member Survey indicate increasing satisfaction on questions relating to a sense of community.
- ... If attendance at OLLI sponsored social events increases.

e) Issue 5: Organizational Visibility

The issue is...

... The visibility of OLLI at Duke and the recognition of its value to Duke University and the larger external community are limited. OLLI at Duke needs to work constantly to create positive impressions among all of its constituent communities, particularly the Duke administration. To the degree that OLLI at Duke reflects positively on the reputation of Duke University it will enhance the possibility of Duke University investing additional resources in OLLI at Duke.

Reasons for the issue...

- ... OLLI at Duke serves a relatively small and somewhat isolated segment of the overall Duke population.
- ... OLLI at Duke is sometimes seen as just “those old people” and not the vibrant community of successful people who make up our membership.
- ... There is limited activity that focuses on public relations or marketing on OLLI at Duke’s behalf.
- ... OLLI at Duke, while being known to the local retirement communities, has few outreach activities into the general community.
- ... OLLI at Duke is represented to non-members online by the Duke Continuing Studies website, which has only limited and sometimes dated material.
- ... Duke Administration may not realize that OLLI at Duke members contribute significantly to the university and participate in many Duke events and activities.

Possible actions to address the issue...

- ... Create an OLLI Marketing & Public Relations Committee with the chair being a member of the Board of Advisors.
- ... Develop an active publicity campaign which focuses on both the Duke community and the larger local community.
- ... Work more actively with the Duke Continuing Studies website to enhance OLLI’s online image.
- ... Work with *Duke Today* to facilitate the publication of additional positive stories on OLLI at Duke.

... Work with various Duke researchers to offer the opportunity to enroll OLLI members in appropriate studies.

... Understand the contributions that OLLI at Duke members make to Duke.

Who will be responsible for managing this issue?

... The chair of the to-be-created Marketing & Public Relations Committee supported by the Communications Committee.

... The Board of Advisors and the Director will support activities as resources are required.

How will we determine if we are making progress on this issue?

... Increasing instances of positive feedback from Duke Administration.

... Increasing number of articles in *Duke Today*.

... Creation of affiliations with Duke researchers and faculty.

... Increasing number of Duke professors and students who teach at OLLI.

... Increasing number of mentions of OLLI at Duke in the external press.

IX) Measures of Success

It is essential to develop and monitor key metrics on a regular basis to ensure that we are making progress on key goals and maintaining the overall health of the organization. The Executive Committee will review these metrics at least three times a year and report back to the full Board, recommending remedial action if required.

The key measures of success for 2016 – 2018 are the following:

- a) **Member Satisfaction** – overall satisfaction as measured by the biennial Member Satisfaction Survey.
- b) **Active Membership** – the number of active members at fiscal year-end as reported by the registration system.
- c) **Course Enrollment** – the course enrollment for each term as compared with previous terms.
- d) **Income & Expenses** – income and expenses for the fiscal year compared to previous fiscal years.
- e) **Number of Courses** – the number of courses offered during each term, as well as the number of courses that are canceled and the number that have waitlists.
- f) **Active Instructors** – the number of active instructors.
- g) **Volunteers** – the overall number of members who have volunteered during the academic year.
- h) **Organization Visibility** – the number of articles published in *Duke Today* and other external publications and the number of “connections” made with current Duke faculty and staff.

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- i) **Social & Community** – the number of members who participate in OLLI non-classroom activities.
- j) **Registration** – the percentage of registrations that are done on-line during each registration period and the number of problems reported.
- k) **Physical Capacity** – the number of classroom seats and parking spaces available each term.
- l) **Waitlists** – the number of individuals placed on course waitlists.

X) Acknowledgements

Many OLLI members and leaders contributed to the development of this plan. Although everyone's input is valued, we especially appreciate the Strategic Planning Committee who spent many months and significant energy on the development of this plan:

- Mary Alexion, Chair (2015)
- Phil Baer, Chair (2014)
- Phil Carl
- Richard Ellman
- Jack Gartner
- Len Goodman
- Tom Hauck
- Marvin Teer
- Jan Tuchinsky
- Stephan Wittkowsky

OLLI at Duke's continuing progress over the next few years will be shaped by their efforts.

Gregg McPherson, President, OLLI at Duke

Garry Crites, Director, OLLI at Duke

XI) Appendix – 2014 Member Satisfaction Survey

The following summary of the 2014 OLLI at Duke Member Satisfaction Survey Results highlights the key wants and needs from OLLI members. The response rate was high (48.3%) indicating that members are willing to participate and provide essential feedback, and giving the Board, and the various committees, confidence in the validity of the results.

- 1) Overall satisfaction with the program is high with 90.5% of respondents indicating that they are Somewhat or Very Satisfied with their OLLI at Duke experience this year.
- 2) OLLI courses and the quality of OLLI instructors are the most important factors determining member satisfaction; 93.7% of respondents said that courses were Somewhat or Very Important to their overall satisfaction with OLLI.
- 3) Respondents rated OLLI course experiences as Good or Excellent on Variety (92.6%), Content (93.2%), Schedule (90.6%), Quality of Instruction (91.9%) and Value for Money (83.7%).
- 4) Respondents rated OLLI course experiences as less than Good (Poor + Fair + Average) on Quality of Classroom Facilities (43.5%) and Opportunity to Socialize (46.1%).
- 5) The majority of respondents, 64.0%, did not participate in OLLI social activities.
- 6) The majority of respondents, 67.9%, did not volunteer in any capacity at OLLI.
- 7) OLLI members are becoming both more willing and more able to utilize electronic communication technology. E-mail was the preferred method for receiving most types of information about OLLI (40.5 – 92.2%) and overall, 99% of our members use some sort of computer or smart phone.
- 8) On-line registration rose from 55.3% of respondents in 2012 to 62.4% in 2014, and 58.5% found online registration Easy or Very Easy; however, 23.1% reported online registration to be Difficult or Very Difficult. For the Fall 2014 session, 81% registered online.
- 9) The OLLI *Spotlight* was read Often or Very Often by 74.6% of respondents; the OLLI member website was visited by 12.3%.
- 10) Nearly half (46.6%) of respondents reported that they regularly use some sort of social media, with Facebook, YouTube and LinkedIn the most popular.