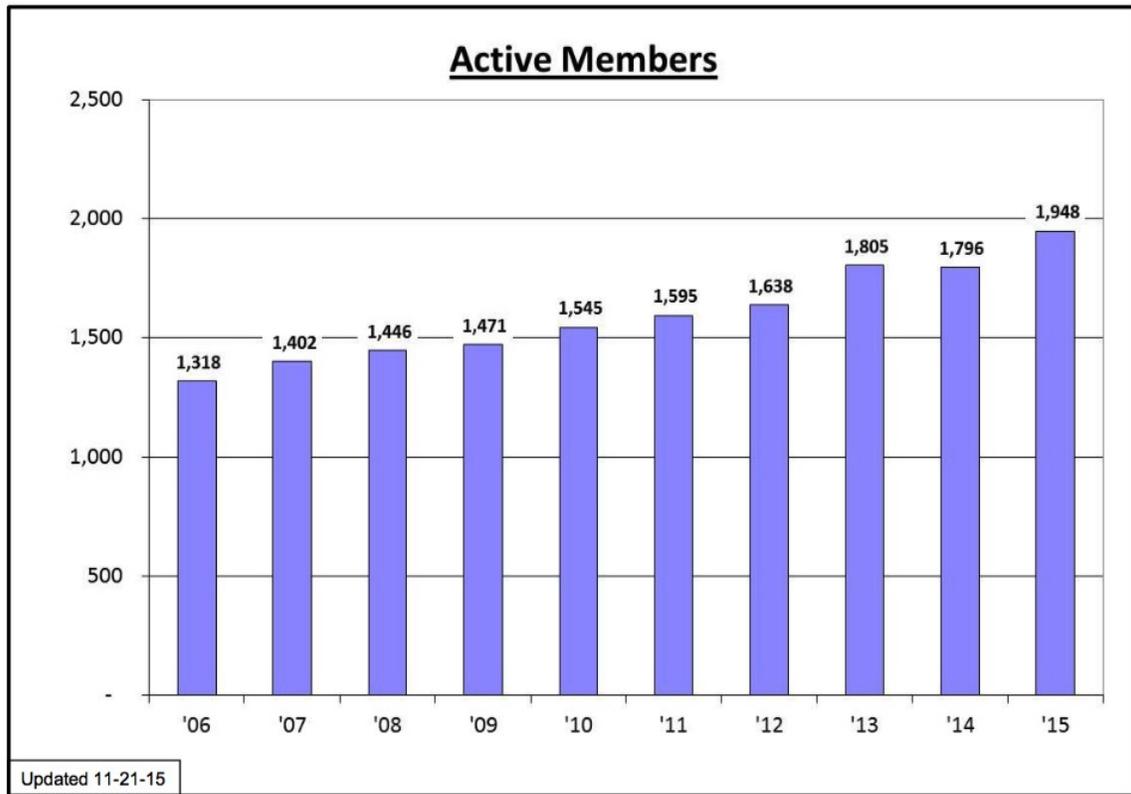


OLLI at Duke Annual Report: 2015 – 2016
Gregg McPherson
President, Board of Advisors
April 16, 2016

It is my pleasure to provide the membership of OLLI at Duke with our Annual Report on the state of organization. In a nutshell, we are in good shape. We continue to grow in both the number of members and the number of courses offered. We are financially strong. We have many new initiatives that are getting underway to make OLLI at Duke even better. What follows is more details on each of these points.

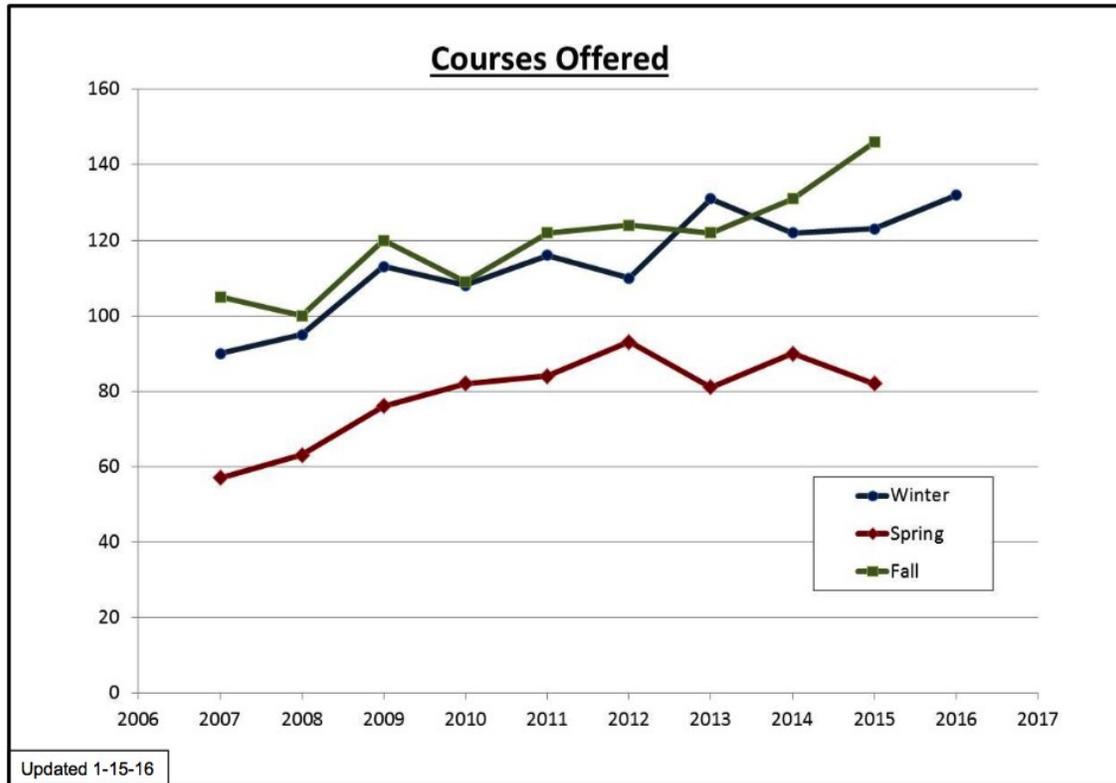
We Continue On a Growth Trajectory

OLLI at Duke membership has been growing at roughly 3.5 percent a year for the last ten years.



While we lose some members every year for personal or other reasons, we more than make up for the loss with new members. Unlike many other OLLIs around the country, we have NOT capped our membership and I hope we never will. Anyone who wishes to join is free to do so at any time. Having said that, the growth we have enjoyed is not so much the result of an active recruitment campaign but rather the result of word-of-mouth endorsements by our current members.

Matching the growth in membership, we are also growing in terms of the number of classes we offer each semester. We offered over 330 classes in the last academic year taught by a large cadre of talented and dedicated instructors.



Not only are we offering more courses on average each semester, the courses we do offer are very popular with almost half being full or having a wait list.

We also have a wonderful Membership Committee that has arranged outside-the-classroom events ranging from museum tours to trips to the ballpark. There really is something for almost everyone in OLLI at Duke.

Accomplishments in 2015 - 2016

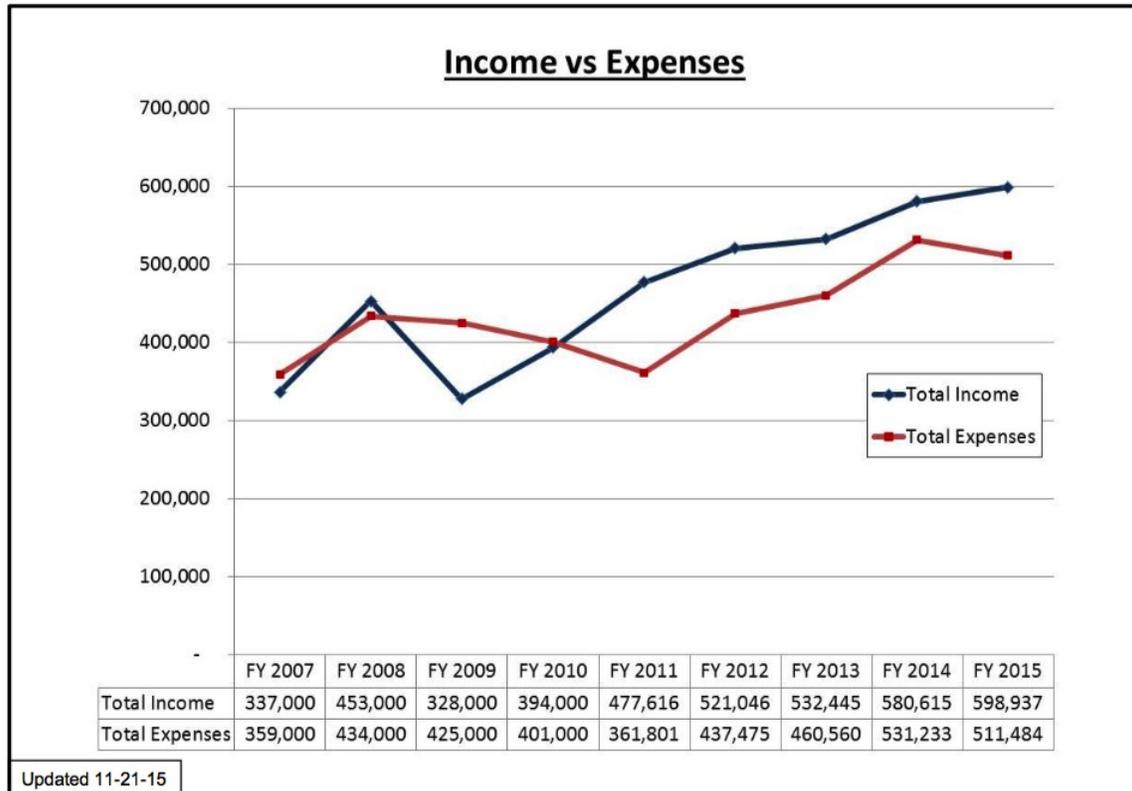
During the past OLLI at Duke board year (April 1, 2015 through March 30, 2016), we have continued to build a better OLLI at Duke for everyone. This is direct result of the energy and time commitment given by the hundreds of volunteers who contribute to every aspect of OLLI at Duke. Some highlights from the last year include:

- ❖ We held the first OLLI-wide Volunteer Recognition Event in May of 2015 and plan to make this an annual event.

- ❖ We completed a new three-year (2016 – 2018) Strategic Plan for OLLI at Duke (read it here), which has been well-received by upper level administrators at Duke
- ❖ We streamlined the Bylaws with a number of changes including allowing for electronic voting (read them here)
- ❖ We conducted the third in our series of Membership Surveys that we do every other year (read a summary here)
- ❖ We reactivated a board-level Space Committee to help identify new classroom space beyond the Bishop’s House and JRC with several new opportunities under consideration
- ❖ We improved our AV equipment in several venues
- ❖ We have continued to improve the information for members that we provide through the Spotlight and the Member Website
- ❖ We have created new written aids to more clearly describe the registration process and reduce member frustrations
- ❖ We have worked with Trinity Technology Services (Duke University) and Duke Continuing Studies IT to revamp aspects of the online registration system to make it simpler and more user friendly
- ❖ We are refocusing our At Large Advisors of the board to be a contact point for new members with each At Large Advisor having responsibility for a certain segment of the alphabet

Strong Financial Health

OLLI at Duke has enjoyed several years of strong financial health due to both the careful management of costs and the interest from the Osher Endowment. The University’s financial year runs from July 1 to June 30 so we do not yet have complete results for 2015 – 2016. Nevertheless, a look at our financial history over the last years paints a positive picture.



With the financial crash of 2008 – 2009 receding into the past, the Osher Endowment has continued to produce a good flow of cash for operations. In addition, revenue from memberships and tuition has covered many aspects of our costs. The net result is a strong balance sheet that we expect to maintain in the foreseeable future. While we currently have a surplus, we need this for both a financial cushion against down times as well as for new space rental when we identify the appropriate location.

Strategic Issues

While much of the picture is positive, no organization is without areas that need to be addressed and improved. The Strategic Planning Task Force spent almost a year reviewing data and input to bring forth a Strategic Plan for the coming three years. Specific areas that are felt to deserve focus by the board include:

- ❖ Space and Facilities – As we continue to grow and as our classes fill, we need to find new, better and larger classroom facilities to meet the demands on our physical capacity. One of the first things we did as a result of strategic planning was to reactivate the Space Committee to help take on one aspect of this challenge – more space.
- ❖ Curriculum – Our curriculum is the heart and soul of OLLI at Duke. We need to constantly be reviewing our course offerings and recruiting new instructors. We want to insure that our courses remain of interest to our

membership. New courses bring stimulating new opportunities for learning. Simultaneously, we are working to improve the quality of the courses delivered.

- ❖ Volunteers – OLLI at Duke is an organization that is vitally dependent on the energy of its volunteers. We have a very small paid Duke staff to handle the administration of the program. Duke staff handle the financial aspects of OLLI at Duke, the registration system, the office, and production of the catalog. Almost everything else happens because of volunteers. Finding and recruiting volunteers is always an ongoing process. We need to bring more discipline and organization to the process of interfacing and connecting with all those members who wish to volunteer for OLLI at Duke.
- ❖ Social and Community – Many members express a strong desire to find more of a sense of community within OLLI at Duke. We lack adequate social spaces in our classroom buildings. We also need to be more a part of the Durham community in which we live. We have identified several areas for focus on this issue through the work of the Membership Committee and the At Large Advisors.
- ❖ Organizational Visibility – Most people who work for the University do not know that OLLI at Duke exists or what it has to offer retiring staff and faculty. We have much to offer Duke and, in turn, Duke can be a better host for OLLI at Duke. We intend to make OLLI at Duke much more visible within the Duke community. Some of our early efforts have focused on more articles about OLLI at Duke being published in Duke Today. We are also reaching out to other Duke organizations to work together on Duke initiatives.

OLLI at Duke – A Unique Organization Within Duke University

OLLI at Duke is a unique organization within Duke. We are not a department nor are we an institute. We are not a club. What are we? We are a membership-based organization that is housed within Duke Continuing Studies and Summer Session. Our membership fees and tuition are used to pay for a small staff of Duke professionals who administer the financial and registration systems of OLLI at Duke. They negotiate the building leases and pay for support services.

OLLI at Duke is essentially created by its volunteers and instructors. All aspects of this work are ultimately overseen by the Director, with guidance from the Board of Advisors. Notice that this is a Board of Advisors and not a Board of Directors. We are not incorporated as a distinct non-profit organization (i.e., a 501c(3)) This means that the board does not have fiduciary responsibility. We concern ourselves with organizing the content of OLLI at Duke, not with managing the financial aspects of OLLI at Duke. We create content and make recommendations on administrative issues but we do not control Duke's policies or practices.

This **hybrid** organization allows us to provide our courses and other activities to our members at a very reasonable cost. Our courses cost \$90 for a full-ten week course. Other continuing education organizations within Duke offer courses that cost from

several hundred dollars to thousands of dollars per course. OLLI at Duke really is a good value.

But we take nothing for granted nor are we resting on our past successes. We continually strive to make OLLI at Duke better for all of our members. When members have a complaint about some aspect of OLLI at Duke, we take the issue seriously. We would love to remove all of these issues immediately but resources are finite as is the time of our staff and volunteers. We have attempted to prioritize what we believe to be the best course of action and that is captured in the Strategic Plan referenced above. (This plan is available to any member who wishes to have a copy.)

We Want to Hear From You

We need to know what is on your mind. We have many forums for providing feedback. As I mentioned earlier, every two years we conduct a member-wide survey. The most recent one was conducted in February of this year. We hope you participated. We also have numerous places where you can send in comments on the Member Website. All of the board members' names, email addresses, and phone numbers are also listed at the end of this report. If you have anything you want to pass along, please do not hesitate to get in touch with me, the Director, or someone else on the board. The more we know, the better we can try to serve your needs.

Finally, my thanks to all of you for making OLLI at Duke the vibrant, stimulating lifelong learning organization that it is. OLLI at Duke IS the members. Please accept my best wishes for a successful year of continued learning in 2016 – 2017.

Respectfully submitted,

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

Appendix: Board Members List and Contact Information can be found here.