
**OLLI AT DUKE
STRATEGIC PLAN
2012 - 2014**

Approved by the
OLLI at Duke Board of Advisors
December 5, 2011

Preface

Many have spoken of the importance of adult learning to society, but none more eloquently than Winston Churchill in a letter to the British Minister of Education in 1953:

"There is perhaps no branch of our vast educational system which should more attract within its particular sphere, the aid and encouragement of the state than adult education. . . . The mental and moral outlook of free men studying the past with free minds in order to discern the future, demands the highest measures which our hard pressed finances can sustain. I have no doubt myself that a man or woman earnestly seeking knowledge in its largest and most uplifted sphere will make the best of all the pupils in this age of clutter and buzz, of gape and gloat."

As members of OLLI at Duke, we pride ourselves on being constantly vigilant in nurturing the joy of learning. Walking through life can be fun and interesting, or dull and boring...or simply frustrating. Success in our life's walk is based not solely on our talents, but also on our decisions. Our skill in making decisions that add a little spice to each day depends on our ability to bring together facts and concepts, develop a mental picture of the desired outcome, and then make decisions that brings us closer to that outcome.

In my experience, making decisions is simplified if one concentrates on main ideas. Concentrating on main ideas provides the substrate for life-long learning and actuates the joy of learning. Learning is fun because the process of discovering a new main idea, adding to our knowledge base, and gaining new insights is refreshing.

A strategic plan is an instrument to ensure the vitality, strength, and longevity of an organization as well as the fruitful discovery of main ideas. This tool helps focus an organization's energy to ensure that its members are working toward common goals, and that they adjust their direction in response to an ever changing environment. In short, strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, with an eye towards the future.

The OLLI at Duke Strategic Plan is ultimately a set of decisions – about what to do, why to do it, and how to do it – no more and no less. Because it is impossible to do everything, strategic planning implies that some activities are more important than others. Much of the value of the strategy lies in making the tough decisions about what is most important to achieving organizational success.

We have, therefore, approached the strategic planning process in a structured manner with full appreciation of the principles enumerated above.

The document that follows represents the hard work of a group of dedicated OLLI members. I have enjoyed working with them and thank them for their efforts.

A. Wendell Musser, Chair / Strategic Planning Committee

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I) Introduction

In the fall of 2010, the OLLI at Duke Board of Advisors asked the Strategic Planning Committee (SPC) to update the Strategic Plan. The previous plan – which covered the years 2008 through 2011 – had served us well but needed to be updated.

Under the leadership of Wendell Musser, the SPC began this task in November 2010. Members of the team who developed this plan were

- Mike Bahnaman
- Pat Bogart
- Garry Crites
- Richard Ellman
- Jack Gartner
- Tom Hauck
- Wendell Musser
- Jan Tuchinsky

This work was completed in November 2011 and the plan was approved by the OLLI Board on December 5, 2011.

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; in 2006 we changed our name to OLLI at Duke.

Over the years, our membership has grown from 42 members in 1977 to nearly 1,700 members in 2011. The number of classes we offer has grown as well...today we routinely offer more than 100 courses every fall and winter.

Since the previous Strategic Plan was developed in late 2007, a number of significant changes have occurred:

- We changed Directors for the second time in three years when Catherine Frank moved to UNC-Asheville in mid-2010 and was replaced by Garry Crites.
- We faced a leadership crisis when both our President and President-Elect stepped down during a four month span in mid-2010.
- The stock market meltdown of 2008 - 09 caused our endowment to go “underwater” and our endowment income to evaporate. This resulted in an annual loss of ~ \$100,000 of operating income, or 25% of our total budget, during the 2009 - 10 and 2010 - 11 school years.
- A modest fee increase was implemented in Fall 2009. This was the first fee increase in over 5 years.
- We formed a new standing committee – the Instructor Relations Committee – to focus efforts on instructor recognition and resources. We conducted our first instructor workshops and our first instructor reception – both are now becoming part of the “way we do business.”
- We shifted the focus of our Technology Committee to increasingly concentrate on *information* technology, and renamed it (Information Technology Committee).
- We created a Survey Subcommittee of the Strategic Planning Committee to coordinate all our surveying activity.

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- We became more “electronic,” creating a number of new websites for various groups (e.g., OLLI Board, instructors, committees, etc.), and increased the use of the *Spotlight* as a communication tool. We discontinued our printed newsletter, which will be replaced with a timelier, less expensive electronic version.
- We moved slowly toward an on-line registration system; full implementation of OneCE occurred in Fall 2011.
- The OLLI By-Laws were rewritten during 2010 with several significant changes including the creation of the position of Vice President, replacing the position of President-Elect. Two new documents outlining the responsibilities of our elected positions and our committees were also written.
- Our membership and course enrollment continued to grow at a manageable pace (~ 5%).
- We focused efforts on making our Board of Advisors more effective.
 - A Board Manual was written and distributed to all board members in 2008; this document was updated in 2011.
 - We initiated a program of annual orientations for new board members.
 - We conducted a survey of board members and a workshop to develop plans for improvement.
- We continued to develop and implement innovative new programs for our members, such as the “Conscious Aging” series.
- We installed new “dual boot” computers in our computer lab during 2008 and moved the lab to Smith Warehouse in 2010.

III) Key Stakeholders

Key Stakeholders for the Strategic Plan are as follows:

- OLLI members,
- OLLI instructors,
- The OLLI Board & Committee Chairs,
- Duke Continuing Studies,
- The OLLI at Duke staff, 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. OLLI at Duke exemplifies Duke University's commitment to community service and lifelong learning through its collaborative work with academic and professional groups, area retirement centers, social service agencies, 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 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, and
- **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

We want the OLLI at Duke of the future to be characterized as an institution that...

- ... provides content and programs that appeal to mature, lifelong learners,
- ... provides superior teaching from highly qualified instructors,
- ... provides a strong sense of community among its members,
- ... is a visible, recognized and valued part of the Duke community,
- ... provides first class space and facilities for its members,
- ... is growing at a rate consistent with the growth of our target demographic in the Triangle,
- ... responsibly manages OLLI resources to maintain and enhance the level and quality our programs,
- ... is a responsible steward of the Osher Endowment for the benefit of our members,
- ... supports and encourages volunteerism and service in our community, and
- ... continues to be the “Duke of all OLLI's.”

V) Assumptions Regarding OLLI Membership and the External Environment

As this plan was developed, the SPC made a number of assumptions regarding OLLI members and the external environment over the next 5 years. The extent that these assumptions are accurate or inaccurate will influence the viability of this plan. The SPC (and the Board more broadly) will need to monitor these assumptions, and if they are

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inaccurate, be prepared to take action to compensate. Key assumptions include the following:

- a) Our operational costs will increase at rates approximating overall inflation.
- b) Membership and demand for OLLI classes will increase at approximately 3 – 5% per year.
- c) Other local Lifelong Learning Institutes (LLIs) such as Encore and Shared Learning will continue to operate and compete with us for members.
- d) Members of newer generations (e.g., Baby Boomers, Gen X, etc.) 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 expect our instructors to deliver course content using different methods.
- e) Technology will continue to evolve rapidly in ways that are difficult to predict.
- f) More of our instructors will expect appropriate classroom hardware & software to deliver course content electronically.
- g) Demand for specialized classes (e.g., fitness, crafts, computers, cooking) will impact the nature of future classroom requirements.

VI) Strengths

- a) **Association with Osher** – being part of the OLLI national network gives us access to new ideas and use of the OLLI “brand.”
- b) **Association with Duke University** – being part of Duke, a respected and internationally recognized institute of higher learning, gives us recognition as a part of an intellectually stimulating environment.
- c) **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.
- d) **Reputation as a Leader in Lifelong Learning** – we are recognized as a leader in lifelong learning, both locally and nationally.
- e) **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.
- f) **Association with Judea Reform Congregation (JRC)** – our lease with JRC allows us access to high quality classroom space with good parking.
- g) **Broad Range of Excellent Classes** – we offer a broad range of great classes.
- h) **Instructor Base** – we have a large number of highly-qualified instructors who are willing to teach at OLLI for nothing, or a small honorarium.
- i) **A Committed Base of Volunteers** – we have a base of volunteers who are enthusiastic and willing to help.
- j) **Social Events** – we offer a broad array of social activities that permit members to interact with each other and establish friendships beyond the classroom.
- k) **Membership** – we have a large, diverse and educated membership.

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- l) **OLLI Staff** – our staff members are committed to the goals of our organization.
- m) **Location** – we are located in a geographic area that has a growing base of retirement-aged individuals interested in lifelong learning.

VII) Weaknesses

- a) **Space / Facilities** – many of our classes are overcrowded and one of our main classroom buildings (the Bishop’s House) is not suitable for our needs. Our options to upgrade our facilities are limited by our lack of capital funds and our reliance on Duke for basic services. In addition, the lack of a single, large facility limits our ability to build a sense of community among our members.
- b) **OLLI Staff** – we have an insufficient number of staff members to support our current membership levels. This deficiency will continue to grow as our membership grows.
- c) **Recognition by Duke’s Administration** – many of our members wonder if Duke’s administration fully recognizes the value that OLLI at Duke brings to the university and to the community.
- d) **Finances** – we have not developed new sources of funding to support future growth.
- e) **Recruiting Volunteers** – the majority of our members do not volunteer to be committee members or otherwise help out. Key volunteers who are asked to do too much sometimes “burn-out.” Our past efforts to integrate new members into OLLI and get them involved in committees have been only partially successful.
- f) **Recruiting Leaders** – it is difficult to identify new leaders and people willing to serve on committees. Attending committee meetings seems “too much like work” to some folks.
- g) **Lack of “Institutional Memory”** – we are highly reliant on the knowledge and priorities of key leaders, especially committee chairs. When there is turnover, the incoming chair frequently has to “start from scratch” with no record 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.
- h) **Lack of Diversity** – despite past efforts, we have not been able to achieve the level of diversity that is compatible with the scope and intent of our organization.
- i) **Lack of Survey Research Tools** – we have not developed useful survey tools to address our quality and effectiveness in meeting the needs of our members, instructors and others.
- j) **Aging AV Capabilities** – the “black boxes” and other AV equipment are not state-of-the-art and are a continuing source of frustration for our instructors.
- k) **On-line Registration System** – the on-line registration system (OneCE) is viewed as “member-unfriendly.”

VIII) Opportunities

- a) **New Members** – the growing pool of retirement-aged people in the Triangle represents potential new members.
- b) **The Osher Connection** – being part of the OLLI network allows us to access good ideas and programs being implemented by leaders in lifelong learning on a national basis.

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- c) **Relationships with Triangle Area LLIs** – building relationships with area LLIs may allow us to offer new courses and access to new facilities.
- d) **Partnerships with New Retirement Communities** – building relationships with additional retirement communities may provide us access to new members and facilities.
- e) **Fund Raising Among Our Members** – we have an opportunity to encourage contributions from our members.
- f) **Fund Raising With Other Organizations** – we have an opportunity to encourage contributions from organizations other than the Osher Foundation.
- g) **Technology** – evolving technology may present opportunities for us to enhance our support for our instructors, to improve our administrative processes, to communicate with our members more effectively, and to allow members to more easily connect with each other.

IX) Threats

- a) **Local Competition** – the proximity of other local lifelong learning programs may present potential members with choices for their discretionary dollars.
- b) **Increasing Costs** – if increasing costs require us to substantially increase fees, we may price ourselves out of the market with some members. Also, if unrelated costs for our members (e.g., gas, food, etc.) increase significantly, some members may be forced to reduce spending on OLLI classes and events.
- c) **Loss of Access to the Bishop’s House or JRC** – the loss of access to either of our main facilities for a long period of time due to fire, loss of lease, etc., would be devastating.
- d) **Loss of Duke Support** – the loss of Duke University support for OLLI at Duke would be fatal.

X) Critical Issues

Four Critical Issues were identified by the Strategic Planning Committee: Space / Facilities, Finances, Curriculum and Technology. In each case, we 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.

a) Issue 1: Space & Facilities

The issue is...

- ... The Bishop’s House is inadequate for our needs (e.g., parking, restrooms, HVAC). This is our largest facility, representing 40% of our classroom seating (1,290 seats / week) as well as offices and meeting spaces.
- ... The limitations of the Bishop’s House are a constant source of frustration for our members and instructors, thereby reducing our ability to attract members and instructors.
- ... Our current facilities do not have sufficient spaces for the variety of activities necessary for operation of the program (e.g., socializing, meetings, office space, storage space, activities spaces, etc.).

- ... We are dependent on rented space at JRC.
- ... A substantial percentage (> 25%) of our classes are filled each term resulting in waiting lists, oversubscribed classes, disappointed students, and lost revenue.
- ... Despite several seemingly promising opportunities in the recent past (e.g., Smith Warehouse in 2008), efforts to move to more desirable on-campus facilities have proved to be false starts.

Reasons for the issue...

- ... The Bishop's House is 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 accommodations.
- ... To date, Duke has been unable to provide OLLI with alternate, on-campus facilities.
- ... Our membership and class enrollment are expected to continue to grow at 3 – 5% per year.

Possible actions to address the issue...

- ... Short-term, we must do the following:
 - Maximize the use of facilities *other than the Bishop's House*, especially for classes.
 - Continue to work with Duke to locate alternate facilities, either on or off campus.
- ... Longer-term, we should initiate a major fund-raising campaign to acquire a different facility within the next five years in cooperation with Duke Development.

Who will be responsible for managing this issue?

- ... The Director will take the lead role in managing this issue.
- ... The Finance Committee will lead the effort to initiate a fund-raising campaign to acquire a different facility.
- ... The OLLI Board 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 an increasing level of satisfaction with our facilities.

b) Issue 2: Finance

The issue is...

- ... Our current fees and endowment income are sufficient to maintain our program, but insufficient to support a major building effort or any expansion of our program elements.
- ... Our endowment value varies with the market and cannot be counted on for a steady income stream.

Reasons for the issue...

- ... We have not had a comprehensive fundraising effort in the recent past.
- ... Many members do not understand OLLI's overall financial condition and may not be inclined to donate to a fund-raising effort.
- ... We are unsure of the revenue impact of future changes in our fee structure.
- ... The majority of our expenditures are outside of the control of OLLI at Duke.

Possible actions to address the issue...

- ... Initiate a comprehensive fundraising effort with a goal of raising sufficient funds to acquire a different building and maintain it. This effort should include solicitation of funds from members and organizations in cooperation with the Duke Development office.
- ... Consider fundraising for lesser amounts for other needs.
- ... Proactively evaluate our fee structure and adjust as needed.
- ... Continue conversations with comparable LLIs on fundraising strategies and implementation.

Who will be responsible for managing this issue?

- ... The Finance Committee chair will take the lead role in managing this issue.
- ... The OLLI Director and Board will assist as needed.

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

- ... If major fundraising efforts are underway.
- ... If providing financial support to OLLI at Duke has become a natural part of the OLLI culture.
- ... If our fee structure supports our financial needs while providing good value to our members.

c) Issue 3: Curriculum

The issue is...

- ... Curriculum is the heart and soul of our program and must be constantly refreshed to meet the needs of our members.

Reasons for the issue...

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

Possible actions to address the issue...

- ... Ramp up instructor recruiting efforts by offering “prospective instructor workshops” several times a year.
- ... More effectively recruit new instructors from our new member cadre by having curriculum committee members attend new member orientation sessions and promote the value of teaching at OLLI.
- ... Systematically “mine” new member information that is submitted with registrations.
- ... Review instructor incentives, including the current honorarium system, and explore non-cash incentives (e.g., free classes for instructors, enhanced Duke Library access, Duke Bookstore discounts, etc.).
- ... Ask OLLI members what courses interest them via surveys, focus groups, etc.
- ... Monitor other LLI’s for good course ideas.
- ... Explore changes in course length, course time and course locations.

Who will be responsible for managing this issue?

- ... The Curriculum Committee chair will take the lead role in managing this issue.
- ... The OLLI Director and 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 new instructors.

d) Issue 4: Technology

The issue is...

- ... Technology is changing the way our entire culture functions, and newer generations of students and instructors may approach learning in ways different than in the past. OLLI must maintain up-to-date capability of the uses of technology for students, teachers and administrators to respond appropriately.
- ... We should have the appropriate technology to address the needs of our members, our instructors, our administrators, and the future needs of new and changing curriculum components.
- ... We need appropriate metrics to address the above and the accountability issues such as quality assurance, cost effectiveness, etc.

Reasons for the issue...

- ... Technology is changing rapidly.
- ... Our members, instructors and administration are increasingly relying on the evolving technologies.
- ... OLLI must maintain up-to-date technology to meet the evolving needs of students, instructors and administrators.

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... The “black box” AV hardware & software is often unreliable and does not always meet the needs of our instructors and students. Support for other classroom hardware is sometimes difficult to obtain in a timely manner.

Possible Actions to address the issue...

... Enhance the Information Technology Committee’s mission to stay current, do necessary research as to the impacts of advances in technology, as they apply to OLLI programs.

... Assess the suitability of our present hardware and software (as well as future needs) to make our inventory more complete and more responsive to user needs.

Who will be responsible for managing this issue?

... The Information Technology chair will take the lead role in managing this issue.

... The OLLI Director and Board will assist as needed.

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

... If periodic member surveys indicate that we are meeting the needs of our members with regard to information technology.

... If periodic instructor surveys indicate that we are meeting the classroom technology needs of our instructors.

... If the existing AV equipment is upgraded.

XI) Measures of Success

The SPC believes that it will be essential to 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. Among the metrics that we believe are appropriate are the following:

- a) **Member Satisfaction** – a member satisfaction survey will be conducted during the 2011 - 2012 academic year and repeated every two years thereafter.
- b) **Active Membership** – the number of active members will be monitored.
- c) **Course Enrollment & Waitlists** – the number of courses that members sign up for each term will be measured and compared with previous terms. We will also measure the number of members who are waitlisted for OLLI classes.
- d) **Income & Expenses** – a comparison of income and expenses will be monitored on a continuing basis.
- e) **Overall Courses, Canceled Courses and Waitlisted Courses** – the overall number of courses offered during each term will be monitored as well as the number of courses that are canceled and the number that have waitlists.
- f) **New Instructors** – the number of new instructors teaching each term should be monitored.
- g) **Member Retention** – the reasons that members quit OLLI or quit taking courses will be monitored.

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XII) Reference Documents (located at www.olliatdukestrategy.pbworks.com)

- a) Strategic Plan Development Process
- b) Summary of "Aging in North Carolina"
- c) Strategic Facilities Task Force Report
- d) Comparative Data from Other LLIs