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**OLLI AT DUKE**  
**ANNUAL COMMITTEE REPORTS**  
**2013 - 2014**

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## OLLI AT DUKE ANNUAL COMMITTEE REPORTS - 2013 - 2014

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*Dear OLLI at Duke Members,*

*Your Board of Advisors is pleased to present this summary of key committee activities during the 2013 – 2014 academic year. This document summarizes the combined efforts of hundreds of volunteers who donated their time to make OLLI at Duke a thriving and vibrant organization.*

*For those of you who contributed to this year's committee achievements, a sincere **Thank You** from all of us on the OLLI Board!*

*Wendell Musser*

President – OLLI at Duke

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### **COMMUNICATIONS** – TAMARA BURKETT

The focus of the Communications Committee in 2013 - 2014 was to sustain and increase use of the new member website and continue the timely publication of the *Spotlight*. We had several additions and changes to the Committee: during the fall of 2013 Kate Krayer and Lynn Lothman joined as writers, and early in 2014 Phil Hopkins retired as *Spotlight* editor and Carolyn Leith assumed that responsibility. Nancy Walker continues as photo editor. Gregg McPherson joined in 2014 as webmaster for the OLLI website.

Accomplishments include:

- Lise Jenkins and Tamara Burkett gave a presentation about developing our website at the Southern Lifelong Learning Conference in Athens, Georgia, in July 2013.
- The *Spotlight*, our key weekly/biweekly publication, was redesigned by Kate, Carolyn, and Phil in early 2014 with great success. Over 2013 – 2014 we saw continued increasing synergy with the member website and offering more community links.
- Use of the member website steadily increased (number of unique visitors):

Apr-13	205	Oct-13	387
May-13	284	Nov-13	560
Jun-13	591	Dec-13	436
Jul-13	468	Jan-14	634
Aug-13	602	Feb-14	775
Sep-13	439	Mar-14	538 (Thru 3/10-14)

- Website content features include:
  - Monthly Volunteer Profiles.
  - Beginning in Fall 2013, monthly Instructor/course profiles.
  - Continued (in partnership w/ Curriculum Committee) Coming Attractions prior to the release of catalogs for each term.
  - Started committee profiles.
  - Partnered with various Board members to create communications campaigns (e.g., Retreats, fundraising, Annual Meeting, and Survey).

## OLLI AT DUKE ANNUAL COMMITTEE REPORTS - 2013 - 2014

---

### CURRICULUM – *GEORGE NELSON*

During the reporting period this committee proposed the following courses:

<b>Term</b>	<b>Number of Courses</b>
Spring 2013	83
Fall 2013	115
Winter 2014	112
<b>Total</b>	<b>310</b>

Some of these were withdrawn by the instructors, other failed to attain sufficient student registrations while new classes were inserted into the catalog. This is all part of the normal process that we have come to accept.

As part of the normal ebb and flow of sub-committee chairs, Bob Gutin and Peggy Quinn left the committee and we wish them well in their future endeavors. We were fortunate to obtain the services of Maxine Smith - Literature and Tony Waraksa - Lifestyles for the coming terms.

We have added an editorial staff to review each proposal in the hope that the course descriptions will attract more students. Once reviewed, each edited description is returned to the instructor for their review and approval. As part of their efforts we have tasked the editors with preparing a short write up to be used in conjunction with the Coming Events feature on the member web site. The Communications Committee reports that they have witnessed a jump in web site activity whenever the Coming Events are posted.

We have kicked off the solicitation of course proposals for the fall term and are a little over a month into this campaign which ends April 25, 2014. Our target for the fall term remains at 115.

We are also working on developing a data system that will allow the committee to monitor the quality of the courses/teachers. We hope this will allow us to develop a more challenging curriculum to better fulfill the needs of the membership.

### FINANCE – *LEN GOODMAN*

During the months following our last Annual Meeting, the Finance Committee focused its attention on financial reporting and contribution campaigns.

- Financial Reporting – we continued to monitor OLLI's financial activities, both income and expense, providing monthly reports to the Board detailing OLLI's financial results. We also providing consulting advice to the Director regarding OLLI's financial policies and pricing.
- Contribution Campaign – with the help of other OLLI volunteers, the Finance Committee designed, developed and initiated a Technology Contribution Campaign. Posters and flyers were put on display at the Bishop's House and JRC and notices were placed in the *Spotlight* and on the member website. the campaign kicked off at the beginning of December and through the middle of January had collected over \$5,500; about 50% of the established goal of \$10,000

### HOSPITALITY – *CAROL ANGELL*

The committee hosted two events and participated in one other in the past year.

- Annual Meeting – April 10, 2013 in the court at JRC; we provided wine and appetizers.
- Fall Convocation – September, 2013 held at the Bryan Center on the Duke campus; we provided paper goods, glasses and table cloths.
- Instructor Reception – January 5, 2014 in the court at JRC; we provided wine and appetizers.

The Hospitality Committee is made up of a fine and willing group of volunteers.

## OLLI AT DUKE ANNUAL COMMITTEE REPORTS - 2013 - 2014

---

### INFORMATION TECHNOLOGY – SYLVIANNE ROBERGE

In January, members of the existing IT Committee were contacted. None of them wanted to remain on the Committee. Fortunately, three new members were eventually recruited in midyear. They have made significant contributions. Wayne Cherry assumed responsibility for AV training and Raymond Conroy and John Brantley developed a successful Weebly training and support program to aid instructors in the development of class web sites.

Mary Alexion assumed the position as Chair of the IT Committee beginning in March 2014.

The OneCE Registration system continued to bedevil users during 2013. Winter 2013 registrations failed because the payment server could not handle the traffic, and users were not automatically notified to renew their memberships as was stated in the catalog. The Fall 2013 Registration was especially traumatic because of multiple serious system problems and the inability of members to contact any OLLI registration staff members. Members were also confused because the online Registration system only accepts credit cards and payments via check must be sent or taken to the Bishop's House. Winter 2014 registration was, thankfully, calmer. The only problem was that a few classes were not open for registration at 9:00 am. This was caused by a manual change of the registration date that missed some courses.

Two new AV systems were installed at JRC. The sound was not configured correctly so members thought that the sound was not working. The Bishop's House solution of unplugging the unit was tried. Unfortunately, this action resulted in the systems appearing to be on when they were actually off. One of the new projectors failed and was fixed. Eventually Kontek made the necessary changes and the systems were operable by mid-session.

The use of Google Drive and Forms was investigated as a way to collect course proposals.

### INSTRUCTOR RELATIONS – MIKE BAHNAMAN

The Instructor Relations Committee consisted of the following members in 2013 - 2014: Mike Bahnaman (chair), Phil Carl (vice chair), Ginny Knight, Tony Waraksa and Tom Wolf.

Key initiatives this year included both continuing and new efforts. *Continuing efforts* included the following:

- **Instructor Recognition Posters** – two posters were prepared at the beginning of each term and displayed in prominent locations at the Bishop's House and JRC. One poster, titled "THANKS OLLI INSTRUCTORS," lists the names of all instructors who are teaching that term; the other poster, titled "NEW OLLI INSTRUCTORS," includes the names and brief biographies of instructors who are teaching at OLLI for the first time.
- **Instructor Name Badges** – distinctive name badges were prepared and distributed to all OLLI instructors prior to each term.
- **Instructor Workshops** – instructor workshops were conducted in August and December, 2013. A variety of topics were offered: "Becoming a Critically Reflective Teacher," "Using Duke Library Resources," "Succeeding in the Classroom," "NC LIVE" and "Building a Course Website." Cumulative enrollment in all workshops totaled fifty-one instructors. Feedback was positive (e.g., 90% of participants indicated that the workshops fully met or exceeded their expectations), although enrollment in most workshops was lower than previous years. The exception was a new workshop, "Building a Course Website," which was full.

## OLLI AT DUKE ANNUAL COMMITTEE REPORTS - 2013 - 2014

---

- **Instructor Reception** – our fifth annual wine & cheese reception was held on January 5, 2014 for all instructors who taught during the prior two years. Eighty-nine instructors, guests and OLLI Board members participated. This represents a decrease of 15 from the previous year. We received many positive comments both during and after the event.
- **Instructor Website** – the instructor website ([www.olliatdukeinstructors.pbworks.com](http://www.olliatdukeinstructors.pbworks.com)) was maintained and kept current.
- **Prospective Instructor Workshops** – a November 7 workshop for prospective instructors was attended by twelve interested individuals. This effort was jointly sponsored by the Instructor Relations and Curriculum Committees. Participant feedback was very positive and we expect that several new instructors will teach at OLLI as a result of this event – past history suggests that over 50% of participants will teach within one year. We plan to repeat a similar program on March 27, 2014, about a month before course proposals are due for the 2014 Fall term.
- **OLLI Instructor Newsletter** – our electronic newsletter, *The OLLI at Duke Instructor News*, was published four times during the 2013 – 2014 school year (April, August, November and February). This publication includes notices of upcoming instructor events, information on instructor-oriented workshops and courses, teaching tips and key dates (e.g., deadlines for course proposals).
- **Biennial Instructor Survey** – our biennial survey of all active instructors was conducted in March, 2013. The 2013 survey duplicated many of the questions from 2009 and 2011 to measure progress. The response rate was excellent (63%) and nearly all (93%) respondents indicated that they were Likely or Very Likely to teach at OLLI again.
- **Course Feedback System** – we continued to use the Course Feedback System on courses with first-time OLLI instructors. Students in 15 Winter courses, 13 Spring courses and 8 Fall courses with first-time OLLI instructors were invited to provide online feedback. The overall response rate was excellent (63%) but varied considerably from course to course (25% to 100%). Individual results were forwarded to each instructor with copies to the Director and Chair of the Curriculum Committee for further discussion as needed. Student satisfaction with most courses was very good to excellent.

*New efforts* this year included the following:

- **Informal Instructor Lunches** – we started a series of monthly instructor lunches to provide an opportunity for informal networking. To date, we have conducted five lunches at local restaurants such as The Marketplace, Spartacus and Neo-China. Attendance has ranged from 11 to 22. We plan to continue this effort in 2014 – 2015.
- **Certificates of Appreciation** – certificates were prepared for fourteen instructors who have taught 25 times and two have taught 50 times. These certificates were presented at the January 5 reception for those who attended; most others received them in their next class session. This small show of appreciation was well received. We plan to continue this effort in 2014 – 2015.
- **Course Website Service** – in conjunction with the Information Technology Committee, we are testing a new course website service for OLLI instructors on a limited basis. This service builds a course website for participating instructors using weebly technology, and then shows them how to maintain it. To date, this service has worked with six instructors. We plan to continue this effort in 2014 – 2015 if we can continue to get the support of the IT Committee.

## OLLI AT DUKE ANNUAL COMMITTEE REPORTS - 2013 - 2014

---

### MEMBERSHIP – MARGARET MCKEON

OLLI President Wendell Musser requested the Membership Committee become responsible, with the exception of retreats, for the duties of the eliminated Activities Committee for the 2013 - 2014 year. The committee organized the following activities and events, selected with the objective of providing an opportunity for the membership to meet outside class and to raise the OLLI at Duke profile in the community. The Membership Committee's plan offered a series of events designed to encourage interaction among the membership not available at either of the main classroom sites.

#### Events for 2013 - 2014

- July 19, 2013 - Durham Bulls game attended by 72.
- September 21 - Fall Meet & Greet attended by 35.
- November 15 - NC Symphony (no attendance figures available).
- November 23 - NC Museum of Art - Porsche by Design exhibit & lunch attended by 13.
- December 18 - OLLI Day Luncheon at Parizade attended by 85.
- December 20 - Duke Chapel Tour attended by 40+.
- January 4, 2014 - Meet & Greet attended by 50+.
- January 26 - Duke Women's Basketball game (cancelled due to ticket policy).
- February 1 - International Civil Rights Center & Museum tour & lunch attended by 32.
- February 24 - NC History tour attended by 17.
- March 26 - Art Show at the Annual Meeting.
- April 5 - Spring Meet & Greet attended by 24.
- May 2 - Sarah P. Duke Gardens Tour attended by 30, with 18 going on to lunch.
- May 3 - Carolina Ballet at DPAC attended by 16
- May 23 - OLLI Spring Picnic at Duke Homestead

#### Tasks

- Provide recommendations to director for ticket pricing or develop budget:
  - OLLI Day Luncheon
  - Civil Rights Tour
  - Picnic
- Publicize coming events using:
  - Spotlight & web site announcements
  - Flyers
  - Posters
  - Emails to new membership via OLLIatDuke@AOL.com
- Event planning & follow through:
  - Request & assign volunteers
  - Answer emails & telephone inquiries
  - Prepare class announcements
  - Report event to submit to web site

## OLLI AT DUKE ANNUAL COMMITTEE REPORTS - 2013 - 2014

---

- Photograph event & edit photos to accompany submission to web site
- Edit & revise New Member Packet for Meet & Greet
- Buy refreshments & supplies
- Purchase tickets or arrange discounts:
  - NC Symphony
  - Carolina Ballet
- Arrange contracts for director's approval:
  - Durham Bulls
  - Duke Gardens
  - Parizade Restaurant
  - Civil Rights Tour
  - NC Museum of Art
  - Duke Homestead

### Other Committee Goals

- Identify OLLI members interested in volunteer assignments and forward to appropriate committee chair.
- Recruit individual willing to lead single events or tour.
- Seek new opportunities for trips, exhibits or activities.
- Distribute OLLI catalogs & notify distribution team for pick up.

Unfortunately, the committee has suspended planning for additional questionable events, requiring ticket purchase and resale until we receive a decision from Duke's legal department.

### STRATEGIC PLANNING – PHIL BAER

The members of the Strategic Planning Committee are: Mary Alexion, Phil Carl, Richard Ellman, Jack Gartner, Len Goodman, Tom Hauck, Wendell Musser, Marvin Teer, Jan Tuchinsky, Stephan Wittkowsky, Garry Crites, *ex officio*, and Phil Baer, Chairman.

### Space and Facilities

This has been a challenging, productive year for the SPC, with most effort directed toward the strategic issue of Space and Facilities. The Space and Facilities Subcommittee has worked diligently to seek solutions to both long-term and short-term issues. Members of that group have carried out extensive research to gather demographic and economic data necessary to strengthen planned presentations by OLLI to Duke Administration, as well as other groups whose support will be essential.

To address short-term issues, committee members met with congregational leaders to discuss the possibility of utilizing space in local churches, including St. Paul's Evangelical Lutheran Church, Grey Stone Baptist Church, and The Church of the Good Shepherd. Those discussions were put on hold after a new one-year lease was signed with Judea Reform Congregation, providing increased utilization with an option for two additional years. In addition, the Smith Warehouse was made available for OLLI computer classes.

To address long-term issues, a meeting with Duke's Associate Vice President for Capital Assets led to the development of a worksheet listing the requirements for an "all-on-one-site" OLLI building, including the financial responsibilities that such a facility would entail. A letter

## OLLI AT DUKE ANNUAL COMMITTEE REPORTS - 2013 - 2014

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was sent to OLLI members requesting participation from people with expertise in Real Estate and Development. Several offers of support and assistance were received.

In addition, consideration was given to whether the Maureen Joy Charter School could be remodeled and up-fitted to meet OLLI's needs. It was determined this option is not a feasible approach.

Recently, members of the SPC met with the Directors of the Duke School of Business to explore whether they might support OLLI's efforts through a consulting relationship.

Over recent months, a Power Point presentation was developed for presentations to Duke Administration and other groups whose leadership, guidance and support will be needed to enable OLLI to obtain the facilities it needs. After several trial runs and extensive discussion, the presentation was approved in concept by the SPC and the OLLI Board of Advisors in January, 2014. The presentation was finished in February, and meeting with Deans of Continuing Studies have been scheduled.

### Finances

During the past year, it was noted that OLLI was missing out on potential revenue since it was not aggressively encouraging members to make tax deductible contributions. To address this situation, the Finance Committee took the initiative to examine the current donation process and subsequently, to design, develop and implement a new donation campaign. Kicking off at the beginning of December, 2013, this campaign is focused on collecting member donations to help defray the costs of replacing OLLI's computers and AV equipment. We established a goal of \$10,000 and advised members of the "Technology" contributions campaign via poster, emails and messages read aloud by classroom assistants. The campaign, which is still in progress, is expected to run through December 2014 and the results through February 2014 have been encouraging; we have already collected over 50% of the established goal.

### Strategic Plan 2015 – 2018

At the March meeting of the SPC, results of the 2013 OLLI Member Survey were discussed, relative to the current Strategic Plan goals and issues. A tentative schedule and assignments for the next plan process were drafted.