

Dear OLLI:

How OLLI has had an impact of my life and learning

In the summer of 1998, I decided to leave the faculty at Michigan State University and “retire” somewhere in the South, so I could be outdoors most of the year. I was considering Richmond, Charlottesville and the North Carolina Triangle. I already had friends in the Triangle, so that was a factor in looking at this area. On a scouting visit to this area in the summer of 1998, I happened to visit the Chamber of Commerce in Chapel Hill and came across the information on lifelong learning at the various universities. I particularly liked what I saw about what was then the DILR program. When I read that information, I realized how much I wanted lifelong learning as a major part of my retirement (I didn’t really stop my consulting work until 2011, but that didn’t involved full time work.

I started classes at DILR in January 1999. Try to imagine what it was like to have a convocation inside the Bishop’s House! Immediately I began to enjoy the stimulation and fellowship of OLLI and, of course, I was greeted ever day by the wonderful smile of our executive director, Sara Craven. For the first couple of years, my involvement with DILR was in taking courses, and enjoying being exposed to a variety of people and study very different from my international management and teaching career.

To my surprise, I was asked by Bill Green, Gwen Griswold and Sara Craven to take on the role of chair of the strategic planning committee. In fact, much of my career was involved in leading positions in strategic planning, both as a top staff person as well as the application role as a managing director of two overseas operations with my company. By chance, I had developed a friendship with Ed Rose, who was the treasurer of the JRC. When I got the assignment as chair of strategic planning, I told Ed Rose about my assignment. The lights went off! As the treasurer of the JRC, Ed was fretting about the fact that the JRC was only going to use their new education wing (this when the project was in the planning phase). If DILR were to rent space in that new education wing, we would meet our needs (drastic) for more space, and JRC would have a good tenant to pay for using that space several days a week.

The culmination of that conversation in March 2003 was the arrangement DILR made with the JRC to use the new educational space. Because the JRC education wing was just in the planning stage, we were able to influence the planning for that space, in terms of technology and the human aspects of senior using that space (in the planning for chairs, etc.)

While that new arrangement was taking place, I devised and led the strategic planning process. We were able to democratize that process by focusing on strategic planning at the mountain fall retreat, thanks to Mary Ann Gross, who chaired the retreat. Following a fall and winter of a lot of hard planning work by the chairs of all the committees, and the leadership of DILR, we had a strategic plan by about April 2004. It was completed at just the time that we had an opportunity to become part of the Osher family of lifelong learning institutes. We were able to use the main ingredients of the strategic plan to forge a proposal for the Osher leadership. To our delight, Sara received the good news that we had been accepted and would be receiving \$100,000. That turned out to turn into another \$100,000 when we submitted our proposal in 2005, following

which we received the generous grants of \$2 million! Those funds enabled us to be able to provide the technology and chairs at the JRC to meet our needs. A task for that included Mary Ann Gross, George Nelson, Rita Weimer and John Logan (the planning chart guru), among others, crafted plans that resulted on a marvelously smooth for us to enter and use the facilities of the JRC. We had some wonderful committees and the board leading us through those years of transition.

I was head of strategic planning until 2006. In 2005, I was fortunate to have the partnership of Mary Alexion as the co-chair of the committee. We presided over a music festival in April 2005, which some of you may remember. For me, it was one of the greatest events of my years with DILR/OLLI. This was our team (plus the one who took the photo – me).



(where are they now?)

On the teaching side, in 2003 Jerry Schiller and I decided to co-teach a course on “The Foundations of the U.S. Constitution.” We had been sparked to do that because we were in a course where we studied the day to day activities at the Constitutional Convention of 1787. We want to know what led up to that momentous occasion, so we crafted a course so address our inquiry. We taught that course in 2003 and then again in 2007. Lots of work, but ever so rewarding!

Since my deep involvement in strategic planning as an instructor, I’ve just basked in the pleasure of the many, many courses I’ve taken, plus the pleasure of the many friends I have made over the years. Even in the recent years, I continue to meet friends in OLLI, thus adding to the wonderful experience of taking the courses.

So what was my favorite OLLI experience? I think it was on June 4, 2004. We had submitted the proposal to the Osher Foundation to gain their support in May, and then we waited. On the morning of June 4, 2004, I had walked into Sara’s office and started our conversation when the

phone rang. When Sara answered the phone and her face lit up like a sunrise, with the best ever smile I had seen on her. She put the phone down and said “We got it!” We had been accepted, and the rest is history.

I have to mention a second experience. Sara, the then head (Beverly) of the music committee and I visited the Professor Larry Todd, who had just authored the book “Mendelssohn: A Life in Music.” He agreed on the concept of a music festival for DILR and friends, to be held at the JRC. On the morning of April 11, 2005, there was a session on “Letters of Fanny and Felix” where Kay Bailey read the letters that Felix had written, and Jim Sackett read the letters that Fanny had written to Felix. There were little interludes where Prof. Larry Todd played – on the piano – some of the music of both Fanny and Felix Mendelssohn. Incredible!! I wish it had been taped, for it was one of the most astounding theatrical events I had (and have ever) seen. Both Kay and Jim were perfect for the parts. And here we were, with an outstanding Duke professor and two of our best, seeing one of the greatest events of my DILR/OLLI years!

How did that affect my life? Hard to say, except that at that point, all of my DILR/OLLI experiences came into focus, and even more than ever, I realized what a treasure we have in the talents of our members, as well as the talents of our Duke faculty. Some may remember our famous literature teacher George Gopen, a man of many, many talents, who was the keynote speaker at that music program, and he was at his best!

What are my hopes and dreams for OLLI? Our membership has exploded in recent years. When I was the chair of strategic planning, we had 1,200 members. In 2017, the membership is 2,200. North Carolina becomes more and more a place for retirees to come to enjoy the weather here, but more importantly to continue to be involved with spirited “chronologically superior” people who love to learn. My hope it that we can continue to grow, while keeping the feeling of intimacy that we so often feel in 2017. That will be a challenge.

I still dream of the day when we may have a center for learning all in one building, as found at Ashville and the University of Delaware, to name several. Only be being in one (or perhaps two) facilities can we experience not only in learning, but also in the socializing among our members.

I hope we will be able to gather more people from areas like Chapel Hill and the Brier Creek area of Raleigh, where there are so many hundreds of people who would like to participate in lifelong learning like those being offered continually by OLLI.

A great dream for the future will be the day when the leadership of the University share our passion for lifelong learning, and recognize the value that our 2,200 members provide to Duke University. I would like the president, the board and the dean of arts and sciences to share the passion I have for lifelong learning that I – and many of the 2,200 – share. We must find a way to have the leadership of the University embrace lifelong learning as one of the greatest gifts that the University can provide to the alumni, to the current 2,200 members and to those who will be joining us in the coming years.