



OLLI 2020

Envisioning the Future

Osher Lifelong Learning Institute
at the University of Denver



OLLI at the University of Denver



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ENVISIONING THE FUTURE

INTRODUCTION:

As we wrote this paper in 2012 we reflected upon the number of changes that took place since our inception in 1996 both in the world and within our own program. We hear daily that there will be more technological advancements in the next ten years than in the past 100. Considering how this will impact every aspect of our lives, including our OLLI program, we set out to better understand the dramatic changes on the horizon.

This is not intended as a plan, for the OLLI leaders in 2020 and beyond will design their own plan, but rather to communicate the responsibility we feel today in beginning the process of preparing for the changes that research indicates are coming and that will drastically affect the future of OLLI at DU.

By the very nature of this dramatic shift we fully understand that what we know today is but a fraction of what lies ahead. Therefore, we intend for this to be a "working document," one that is reviewed and expanded upon annually by OLLI leaders.

We want our successors to know that as "curious" members we are receptive to change and want to do our part to ensure that OLLI at DU remains a leader in the field of lifelong learning.

Sincerely,

The OLLI 2020 Committee at the University of Denver

Vonnie Wheeler, Executive Director, OLLI at DU

OLLI Central:

Tom Brightwell, Financial Liaison

Cathy Stevens, Facilitator

Ann Tull, Member-at-Large

Dick Wisott, Member-at-Large

OLLI West

Karen Thorne, Co-Manager

Karen Kalabany, Co-Manager

Al White, Financial Liaison

Tom Boshon, Member-at-Large

OLLI South

Jenny Fortenberry, Manager

Bob Armstrong, Financial Liaison

Susan Long, Member-at-Large

Sandra Alinger, Member-at-Large

Barbe Ratcliff, Member-at-Large

OUR HISTORY

The Osher Lifelong Learning Institute at DU (OLLI at DU) began in the fall of 1996 with 76 people taking nine classes. Then, as now, we were a program of University College at the University of Denver. Then, we were known as VIVA! (Vibrant, Intellectually, Vigorous Adults).

In 2006, recognition by means of generous financial support by the Bernard Osher Foundation, we became OLLI at DU joining scores of similar educational programs throughout the United States. Two major grants and a \$50,000 gift allowed us to develop two additional OLLI programs, OLLI West and OLLI South. All three sites operate under the OLLI at DU umbrella. Combined, we currently offer more than 300 classes a year for 2,000 members.

In 2007 we were awarded the University of Denver's Chancellor's Award for, "The Best Program on Campus."

Our Mission Statement: OLLI, a member-volunteer organization, offers non-credit academic classes and stimulating programs, along with social opportunities for retired and semi-retired men and women. Members use their talents, experiences, and skills creatively in shared intellectual and cultural pursuits. We strive to respect diversity of thought in a relaxed, supportive academic environment, exploring new interests, discovering and developing latent abilities, and contributing to the immediate or broader community.

Our Slogan: "CURIOSITY NEVER RETIRES"

The success that OLLI at DU experiences today can be attributed to the following factors, which we believe are timeless.

1. The dedication and adherence to core values along with a strong, decisive, organized and responsive leadership guiding these principles. These enduring values are strongly held and not easily changed:
 - Academically focused classes combined with a division allowing for lighter learning experiences and activities
 - Quality produced and implemented affordable classes for anyone over the age of 50
 - Intellectual and social interaction
 - Comfortable, technologically equipped classrooms with adequate close-in parking
 - A high level of volunteer involvement
 - A positive image and clearly defined relationship with the Osher Foundation, University of Denver and the community
 - Financially sustainability
 - And, understanding that growth doesn't only mean an increase in numbers, but that growth also means advancement in ways of thinking and doing things...a way of ensuring that the students of tomorrow are as stimulated as the students of today

2. The recognition of what these values have achieved resulted in major financial support by the Bernard Osher Foundation.
3. The commitment to OLLI by the University of Denver
4. The dedicated contribution of talent and time by our volunteer facilitators and committee members as well as volunteers in other important capacities

Coming from a position of strength we have been able to dedicate attention to the goal of looking at and planning for the future.

OLLI 2020

We believe that the best service one generation of OLLI leadership can provide to successive generations is the communication of our core values along with an informed understanding of the immediate future. Thus we developed the OLLI 2020 Committee which came together to ensure the continuance of a strong existing program while anticipating and becoming more acutely aware of steps that we need to begin taking as evidenced by extensive research revealing the changes in demographics, technology and life styles expected over the next ten years.

A committee, representing all three sites began meeting in 2010 with the objective of ensuring the continuance of a strong academic program that will keep abreast of the multiple technological changes predicted within the next ten years. First, we divided the study into five phases.

1. Demographic Research
2. Program Content
3. Growth and Finance
4. Facilities/Staffing and Competition
5. Quality

We were purposeful about what current practices may soon be outdated and which ones we want to continue, or need to adapt, to meet changing times.

DEMOGRAPHIC RESEARCH

Studying the results of two major research projects (directed by The Denver Regional Council of Governments and the Rose Foundation on Aging) and applying the findings to OLLI we determined the following

- The word "retirement" has a much different meaning today than 20 years ago when it conjured up thoughts of endless golf, afternoon bridge, luxury travel and babysitting. Certainly, these endeavours remain important and appreciated, but the significant shift that we are beginning to see is just the tip of the iceberg influenced primarily by better health and all of the possibilities open and exposed to people via technology. Thus creating a greater sense of curiosity and opening

vistas to be explored individually or in the company of like-minded people. Some traditional, comfortable activities/hobbies may be replaced with more exploratory pursuits.

OUR CHALLENGE will be to establish ourselves as the resource for exploration providing an atmosphere in which people feel encouraged to be an amateur...creating a "come and try it" environment.

- As Colorado residents are more residentially stable than other states with a more transient population, people tend to "age in place" here. Colorado is also regarded as a highly desirable place to retire. Consequently, we see our current members participating in OLLI well into their 80s and even 90s. Additionally, with older people in better health we see a "younger" and more adventurous 60-70 year old than we did 20 years ago.
OUR CHALLENGE will be to provide programming that appeals to a wider age spread with multiple interests.
- Research indicates many people will only partially retire at 65. Many will continue working, possibly changing professions altogether.
OUR CHALLENGE will be to accommodate these non-traditional retirees by possibly including evening and weekend classes and perhaps adding smaller "blocks" of study along with our current eight week terms. Also, to participate in existing "Reinventing Retirement" classes or develop our own.
- By 2050 all research indicates that Caucasian will be the minority race.
OUR CHALLENGE TODAY AND IN THE FUTURE is to find ways that successfully broadens our racial base. Today, we are in touch with representatives from various ethnic organizations informing them of our offerings, as well as contacting those individuals with expertise in specific areas inviting them to consider being a facilitator. It is a slow process and it is our deepest hope that in 10 to 15 years the OLLI membership will be more racially mixed. Thus, broadening our perspectives.
- Some researchers feel that volunteerism will increase as people retire. Today, we see two different attitudes regarding volunteerism. Some feel "this is my time to pursue my own interests after volunteering for many years." Those currently volunteering have selected one or two areas of great personal interest and continue to volunteer. This is a very personal area and it is difficult to predict how the OLLI member in 2020 and beyond will feel about this.

OUR CHALLENGES:

Internal: For us to continue attracting active internal volunteers it is essential that: facilitators are well trained, supported, appreciated and recognized; and, committee members are encouraged, heard and acknowledged.

Outreach: To develop a volunteer program that reflects what we do and represent. For example, partnering with schools, not as tutors, but as mentors where our member's expertise and experience can enhance a particular class topic. This is but another example of how we can grow the Community Partner concept that we feel should and will gather strength over the next 10 years.

- Research shows a significant change in lifelong learning from that experienced 30 years ago when it consisted primarily of individuals auditing college classes or periodic programs at senior centers, religious organizations, retirement homes or small gatherings in people's homes, (e.g. Great Books or Great Decisions programs). We know that lifelong learning will increase and expand dramatically over the next five to 10 years encompassing far more than today including greater educational travel and inter-generational learning. OUR CHALLENGE TODAY is to begin the process of including these aspects in our programming so in 10 years it will be a matter of enhancing rather than developing.

PROGRAM CONTENT/EQUIPMENT

Curriculum content is based upon on-going interest and facilitator availability and should be determined by the Curriculum Committee members considering current interests, topics and facilitator availability. Therefore, the OLLI 2020 Committee has not speculated about the curriculum content of 2020 and beyond.

Please refer to ADDENDUM A, a letter from Anita Leitner, 2010- 2013 Curriculum Committee Chair from OLLI Central.

OUR CHALLENGE TODAY is to supply the needed expertise necessary to accommodate increased demand.

As we move towards 2020, we are in the process of developing:

FITNESS AND WELLNESS

Research places increased attention on "Fitness and Wellness." We are beginning to incorporate fitness components in our program by the implementation of an on-going Yoga class and a special OLLI member price for the University of Denver Coors Fitness Center, as well as offering occasional biking and hiking outings OUR CHALLENGE TODAY is to continually improve this area and turn it into a strong OLLI component ready for 2020's attractive enhancements!

EDUCATIONAL TRAVEL

Interest in education travel began with ElderHostel several years ago. Today, because of widespread, growing interest numerous companies are involved. We have offered educational travel within Colorado for over 10 years and just recently included an education travel trip outside of the state. We are currently in the process of researching an international trip. We understand the desirability of a travel program and plan to continue developing unique educational trips. This should be well established by 2020 and barring any international financial or military crisis, the program will undoubtedly be going strong. We envision an exchange of information with other OLLIs, as well as trips in conjunction with other OLLIs across the country.

LARGE LECTURE CLASSES

- We have recently been incorporating a few larger classes with non-member experts in specific areas as teachers. We consider these classes an enhancement to our general focus of peer-led classes.
- We have also begun the process of meeting with university departments inviting them to participate in these "Speaker's Series" classes.

OUR CHALLENGE TODAY is to maintain a healthy balance between these classes and peer-led classes while complementing our curriculum with experts. The key here is balance.

TECHNOLOGY

Today, members are becoming increasingly more familiar and comfortable with the digital environment.

OUR CHALLENGE MOVING FORWARD is to continually integrate new technologies into our OLLI programs while easing members into their use. And, to place high priority on planning and budgeting for new and/or up-graded technology.

Today, members *appreciate* new technology, tomorrow they will *expect* it.

GROWTH AND FINANCE

GROWTH:

In the past three years (2010 -2013) OLLI at DU grew at about 19% per year. OLLI South grew at 45%, OLLI West at 25% and OLLI Central at 12%. The implications of this kind of growth are huge.

FINANCE

OLLI is a membership organization. Its primary source of revenue comes from members' fees and tuition. As a membership organization, OLLI must be fiscally responsible.

Today, with the current membership fees at \$100 per term along with interest from the Osher endowments, OLLI is at breakeven and in a healthy financial and growth position. This is largely due to the good program management and cost controls by the Director and OLLI Managers as well as the huge contributions of volunteers. Any additional funding through annual appeals can be used for much-needed support for growth of new facilities, audio/visual equipment and program enhancements.

Our findings also indicate that fundraising efforts, including the Annual Appeal, should continue indefinitely. These findings also demonstrate the advantages for long-range development of Community Partners.

Today, we believe that in the case of a shortage in funds the first avenue to pursue would be to add an additional membership fee, rather than to raise tuition.

Note: Currently the membership fee is included with the tuition.

FACILITIES/STAFFING AND COMPETITION

FACILITIES

The projected growth rate indicates the continued need for improved and additional facilities.

OLLI Central is working with the University of Denver toward the goal of a "home." They seek a place on or near the DU campus with adequate classrooms and parking that will accommodate the entire OLLI Central membership under one roof. Currently, classes are held at two sites in the central area.

Retirement housing is changing rapidly. Now, rather than a few residential buildings, there are "retirement communities" with dwellings ranging from single homes to long-term care facilities. More recently there is a trend for retirement condominiums located near colleges and universities as well as in the vicinity of museums, Performing Arts Centers and a variety of restaurants. Many of these house lifelong learning classrooms on the ground level.

We will be keeping an eye on these developments with high hopes of being able to bring our large OLLI Central program under one roof within one of these developments. Hopefully, that is where we will be by the time you read this in 2020.

When discussing expansion by 2020 South and West will most likely each have a satellite located in populous South and West areas. Thus, attracting another group of people. Broomfield and Bow Mar areas have been discussed for West, and, Parker and Castle Rock for South. At this time operating under one umbrella makes the most financial sense (one Manager, One Curriculum Committee with a Coordinator for the satellite location). However, as we approach 2020 these areas may be strong enough to be considered a self-supporting individual site.

It doesn't take research to understand the impact that mass transportation has made on our community today, and what will be available in 2020 and beyond. As we know, this is going to continue to change not only how people move, but how people live. Any plans made for an OLLI location need to take public transportation into consideration.

STAFFING

At the current time, the organization runs effectively with a dedicated, Executive Director and with managers at each site assisted by adequate clerical and audio/visual support. Attention is placed on volunteers to help alleviate staff requirements. Staffing in 2020 depends entirely on enrolment and facilities needs.

COMPETITION:

The popularity of lifelong learning Institutes is growing at a significant rate. We believe

the Bernard Osher Foundation is largely responsible for this. The success of Mr. Osher's inspiration has spurred the development of similar, independent programs in our community.

We prefer not to look at them totally as competition, but rather as other organizations responding to the growing educational desires of retirees, enabling more people to participate. Our hope for our program in 2020 and beyond is that these other organizations continue to be treated with respect, honoring the rights of their program and instructors (facilitators).

We will always need a clearly defined mission statement that distinguishes OLLI from other programs.

QUALITY

As the OLLI at DU program has evolved over these many years, we have listened to our members who have expressed their views on how the program has impacted them personally and enhanced their lives. We have listened to their ideas and their concerns. As a membership program their comments are taken seriously. Collectively, they have helped us build a carefully crafted structure of multi-faceted classes and activities. This has become the method by which our OLLI program has achieved the high-level quality standard it enjoys today.

A significant focus of our 2020 effort has been to identify critical core values (see page one).

OUR CHALLENGE TODAY is to fully communicate our principle values to serve as a guide for future leadership and to instill their importance as the cornerstone of our program.

CONCLUSION

From our small beginning we were not initially expecting nor focusing on growing as dramatically and as rapidly as we did. But with good fortune, strong leadership, a long-standing and mutually rewarding relationship with the University of Denver and subsequent fortunate association with the Bernard Osher Foundation and the Osher Lifelong Learning Institute, we have thrived beyond our most ambitious dreams.

And, it has been our relationship with our membership, and its zeal for making OLLI at DU a key part of their lives, that became the driving force which has led to our long success pattern. Without the volunteers who created and fostered our peer-led approach to lifelong learning and the dedicated committees which guided the effort, we never would have achieved the level of success we now enjoy. While there are many ways to measure success, constructing a sense of community within our OLLI membership has been our greatest reward. Intermixing dedicated people with years of experience, along with hard work, high ethical standards, creativeness, friendship, a joy in learning, an inquisitive mind, a sense of humor and a willingness to share is what builds a solid foundation.



OLLI at the University of Denver





at the University of Denver

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