HIGHLIGHTS

■ 1,184 members
■ 263 classes
■ 134 peer leaders
■ Signed first “silver level” business sponsorships
■ Featured in FY’15 President’s Report for the CSU, Chico University Foundation
■ Program Director selected to serve on OLLI National Resource Center advisory group and served on two presentation panels at the 2015 fall conference in North Carolina
■ Launched new mentoring initiative through faculty in the College of Business
■ Second annual OLLI Summer Play Festival featured eight OLLI playwrights and 30 members as actors, directors, and design/stage crew.

A FOCUS ON DEEPENING MEMBER SERVICES

A modest increase in membership of 2% over last year reflected a deliberate effort on the part of OLLI leadership to shift focus from outreach and recruitment to deepening member services and expanding programming. Member satisfaction remains a high priority. Surveys were created and distributed to both current and former members to assess overall satisfaction with OLLI programming, activities, and member services. Strong response rates for both groups showed positive feelings towards OLLI—even for former members who cited transportation and health reasons as the biggest factors for lapsed memberships. Additionally:

• Only 4% of recently lapsed members stated that cost of membership played a role in their decision not to renew.
• 75% of respondents said they’d be very likely (41%) or likely (34%) to rejoin OLLI.
A fresh approach to annual planning is engaging Advisory Council members as more active contributors to the shaping and prioritizing of annual goals and objectives. Greater input and feedback from the general membership through surveys and focus groups will also influence the planning process. Benchmarks have been established for 2016-17 by each committee chair, and progress toward achieving specific objectives will be periodically evaluated by the council during the fiscal year. This collaborative approach helps council members feel connected to the planning process and consequently more invested in the outcome. (See “Planning is Cornerstone,” on page 6 for more about OLLI planning process.)

2015-16 FINANCIAL OVERVIEW

Perhaps OLLI’s greatest financial challenge over the past few years has been to increase revenue enough to make up for the phasing out of a major subsidy from Regional & Continuing Education (RCE). Following the market collapse in 2008, which put the endowment under water, RCE assumed major costs for OLLI, including program director salary and other expenses related to the website and the development and support of the online registration system. In 2013, for example, support from RCE totaled more than $80k.

A stipulation of the first and second Osher endowments is that OLLI would begin and thereafter maintain an annual fundraising program in order to become self-sustaining. We’ve come a long way in a short time. Filling this void, however, has been challenging and sometimes confusing for members who see substantial revenue growth, but have a harder time recognizing where it goes.

How Much Income Does OLLI Generate?

Some members are surprised to learn that membership fees don’t fully cover the cost of operations. We are very proud of the fact that we’re among the very least expensive OLLIs in the nation—even when compared to those in similar rural communities. As referenced above, OLLI relied on RCE to close the gap in the past.

Today, as a mostly self-support organization, OLLI must make up the difference between what it charges members in fees and what it needs to cover annual expenses. The endowment income from the Osher Foundation is intended to supplement OLLI operational expenses. Last year, the endowment revenue made up 24% of the total income stream. In 2016-17, OLLI will, for the first time, have access to income from both endowment awards. However, market losses in 2015 negatively affected overall endowment earnings and reduced the total income available to OLLI. And while we continue to meet minimum fundraising targets, member donations comprise only seven percent (7%) of the overall revenue pie. A primary focus of 2016-17 will be to expand total fundraising gifts, while also maintain the quality of the overall learning experience.
2015-16 FINANCIAL OVERVIEW, cont.

What Does it all Cost?

The greatest cost of running OLLI is its staff. In 2015-16 OLLI employed 1.8 Full-Time Equivalent (FTE), or less than two full-time employees. This includes the Program Director, who was promoted to full-time equivalency in 2014, and two part-time assistants, Susan Levine, who provides tireless member support services, and bookkeeper Pamela Camara, who volunteered for OLLI in the same capacity for over a year before being hired.

Additional staff support comes through Regional & Continuing Education (RCE) for what is called “reimbursed time.” Reimbursed time reflects the portion of salaries paid to staff at RCE for services in skilled areas like marketing, graphic design, and Informational Technology (IT). Bernard Osher’s vision for locating all 119 OLLI programs on college and university campuses was inspired by the idea of shared resources. Instead of hiring someone with marketing experience and someone else with expertise in technology systems, for example, OLLI instead pays a small portion of these salaries for the actual amount of support needed.

There are also administrative fees charged by the University for managing operational functions like payroll taxes, HR matters, insurance coverage, authorization of contracts (and insurance for rentals), bill paying, and management of the annual fund and endowment fund investments related banking. Again, the Osher model of shared resources enables OLLI to target specialized areas of expertise in the right amounts needed without becoming top heavy and passing unnecessary expenses on to members.

Operational Grants Supplement Cost of Operations

Two operating grants (separate from the endowments) totaling $100k over the past three years paid for the expansion of Program Director’s hours from part-time to full-time employment. These dollars were also used to offset the bookkeeper’s salary in 2014-15 and 2015-16 and helped OLLI assume responsibility for the direct costs of RCE personnel. These grants were awarded to OLLI Chico expressly for the purpose of reinforcing staff support for an organization that has doubled its membership in a short time and tripled the amount of programming and activities since 2012. Both grants are separate from the Osher endowments and were co-written by OLLI Director Ann Nikolai and RCE colleague Melissa McGowan.

OLLI also enjoys campus services for which it pays nothing. The offices at Aymur J. Hamilton, for example, are donated by CSU, Chico. Regional & Continuing Education pays to host OLLI’s web servers and covers janitorial service and other in-kind support. Continuing Education also sponsors a fall outreach campaign to recently retired CSU, Chico employees. Over the past few years, 30 employees have taken advantage of the opportunity, several of whom have led classes for OLLI, including David Rothe, Marc Siegall, and Peggy Dufon. The offices of University Advancement, CSU, Chico’s fundraising division, provides fundraising direction and support at no charge to OLLI. And we are currently working with several departments on campus to explore greater opportunities in areas like hearing assistance, volunteer leadership training, and additional peer leader support.
COMMUNITY SUPPORT PROVIDES “WIN-WIN”

Many non-profit organizations look to their community neighbors for support as one way of raising friends and dollars. These partnerships build good will and expand opportunities for members and/or patrons from both groups. OLLI’s experience has been the same. Chico Hearing Center joined first through a connection with an OLLI volunteer who is also a customer. Altum Wealth Advisors is owned by a husband and wife team, both OLLI peer leaders, who’ve been active donors since OLLI launched its first fundraising campaign in 2013. Chico Eye Center came on board in July—also through an OLLI volunteer and a long-time customer. In sum, these three “silver level” sponsors each donated $1,000. In return, they will enjoy a presence at OLLI meetings and will be offering free screenings and consultations throughout the year. While the exposure is good for business, OLLI is seeking sponsorships from local businesses and organizations from which our members also benefit. Your suggestions on potential sponsorship opportunities are encouraged and can help offset the cost of OLLI operations. Please contact Gayle Womack in the office at (530) 898-6679.

Building community partnerships is a priority that takes many forms for OLLI. For two years running, Blue Room Theater, thanks to the networking chops of OLLI member Nancy Leverette (former Board President of Blue Room), OLLI has enjoyed in-kind support for its annual play festival in the form of technical and dress rehearsal space, ticket promotions and sales, and assistance from lighting and stage technicians who assist Blue Room productions. This form of sponsorship has allowed more than 60 OLLI members to explore the world of the theater—most of them for the first time. All eight performances over the past two years have been to capacity and have introduced hundreds of OLLI members to this local gem of a theater—also good for downtown businesses.

VALUE OF THE OLLI EXPERIENCE ACKNOWLEDGED BY CSU PRESIDENT

CSU, Chico’s University Foundation Annual Report highlights the human impact of giving and includes stories of donors, students, faculty, staff and community members demonstrating the essential role supporters like you play in the future of Chico State. OLLI was featured in the report, both for the endowment that we earned together, and for inspiring lifelong learning in the North State. The oversized glossy booklet includes a beautiful photograph of members of the popular Arts & Eats class at the Chico Art Center last fall followed by a short article on OLLI. We invite you to read our story online or view the entire annual report for our story and many other inspiring examples of giving in our community.
PART-TIME STAFF MAKES BIG-TIME DIFFERENCE

OLLI recently welcomed two new part-time employees, Gayle Womack and Michele Desmond, who will provide additional support to OLLI volunteers and members. Gayle and Michele join part-timers Susan Levine, Member Services Representative, and Pam Camara, bookkeeper. While each of these employees works a maximum of 12 hours/week, their specialized roles help OLLI focus on key operational areas without the expense of hiring another full-time assistant. Federal work-study dollars help offset the cost of a student employee. This fall, Kylie Griffis replaces Katie Coleman, who graduated in May.

Long-time volunteer Gayle Womack, who most recently served as chair of the Advisory Council (2013-2016), will serve as Volunteer Liaison. In this capacity, she will assist the Program Director in overseeing each of the volunteer-led committees and their various projects. There are now more than 200 volunteers working on several dozen major projects, from public events to audio-visual training and support.

Michele Desmond will act in a role in which she has also volunteered—Operational Coordinator. An OLLI member since 2013, Michele brings more than 30 years of experience in finance and operational management. She will assist the Program Director in overseeing the daily operations of the Administrative Office and providing support to staff.

Kylie Griffis is a junior majoring in Liberal Studies at CSU, Chico. Near and dear to our hearts, Kylie is pursuing a career in education and hopes to be a first-grade teacher. When she’s not working or studying, Kylie enjoys time with her family and nine (!) dogs!

In addition to providing greater support to office functions and volunteers, the addition of these part-time positions will enable the office to expand its hours of operation to five days a week. Our goal is to be more responsive to members’ needs and interests. If you have questions or concerns, or would like to be more involved, please contact us at (530) 898-6679.

OLLI MENTORING INITIATIVES

Last fall, Roy Cook led a new charge to connect OLLI members with CSU, Chico students seeking mentors. “For those of us who’ve spent the last few decades in professional careers, we have a lot to offer the next generation,” explained Roy.

CSU, Chico professors seem to agree. A small team of OLLI mentors, including Roy, participated in a trial program last year under the direction of College of Business professor Suzanne Zivnuska. The focus was on business writing and presentation skills in preparing students for coveted internship opportunities. Professor of Management and author Curtis DeBerg enlisted several OLLI volunteers to judge student projects.

“The focus goes beyond teaching life skills,” Roy explained. “Our objective is to provide maximum support to these students, while also maintaining maximum flexibility for our volunteers.” Roy is interested in recruiting more volunteers. “A mentor once told me he’d never met anyone who didn’t want to be part of something greater than himself,” Roy reflected. “This mentoring initiative is designed to provide such an opportunity.” And what could be better? A mutually rewarding relationship is developed with positive goals as the focus. For more information about how to become a mentor, contact Roy Cook at 123rsc@gmail.com.
LONG-TERM PLANNING IS CORNERSTONE OF NEW CHAIRMAN’S VISION

On July 1, incoming Advisory Council Chair Mike McCluskey was making editorial notes on the umpteenth draft of the 2016-17 annual planning document. The date also marked his first official day in office. However, Mike is no newcomer to the role having dedicated much of last year to spearheading OLLI’s annual planning process. As Chair-elect in 2015-16, Mike apprenticed under outgoing Chair Gayle Womack, who now works part-time in the office as a liaison to OLLI’s more than 200 volunteers. “Mike has a voracious appetite for order and process,” Gayle said recently. “And it’s contagious.”

Gayle described the momentous task Mike undertook last fall when he volunteered to lead the annual planning process for 2016-17. His goal was to involve the leaders of each of OLLI’s five major committees in proposing activities in support of OLLI’s annual goals. Each of these activities also includes specific timelines so that Mike can track progress in each area. In sum, there are 44 objectives supported by 273 activities for the 2016-17 academic year—all in support of five institutional goals established by the Program Director, with approval from Mike and the entire Advisory Council.

“The point is, it’s a collaborative process,” Mike explained. “If the team doesn’t feel some ownership over the planning process, then it breaks down and becomes difficult to get anything accomplished.” Sydney Wilde, Co-Chair of the Curriculum Committee agrees. “Mike makes planning fun,” Wilde shared, nearly serious. “He’s taken something most of us volunteers weren’t really crazy about, and he helped us see its relevance. Without following a systemic planning process, all of the effort we expend doesn’t really go anywhere. By involving us, and really engaging us in the process, we see results. And when you see results—when your entire team feels the victory—then you know what you do makes a difference.”

With more than 30 years of experience in public sector management, Mike has an arsenal of tools that are now shaping how OLLI gets things done. And he’s looking ahead. Program Director Ann Nikolai is already working with Mike on a longer-range plan that will begin to frame OLLI’s vision over the next several years.

“The excitement of working with older adults is that so many OLLI volunteers bring such depth of experience to the table,” Ann said. “Mike’s expertise in the area of planning is invaluable to OLLI, especially as we continue to confront major choices about the future.”

OLLI will be announcing town hall-style meetings starting this spring as its five-year strategic planning process gets underway, led by Mike. OLLI members and campus and community partners will be invited to participate and share their vision for OLLI’s future. We invite you to view the 2016-17 Annual Plan and all 273 activities in the works this year at http://tinyurl.com/jq65f9b.

Do you have planning experience? Contact Gayle Womack at (530) 898-6679, if you’d like to get involved!
"MIDSUMMER MISCHIEF" INSPIRES IMAGINATION

In June, Blue Room Theater presented four performances of the second annual OLLI Summer Play Festival, a collaboration of more than 30 OLLI writers, actors, directors, and designers/managers. Headlined “Midsummer Mischief” in playful tribute to its eight original comedies, the festival showcases mostly novice talent and inspires others to take a chance.

Festival founder Pamela Loyd designed it that way. After retiring from Modesto Junior College in 2014, Pam and her husband relocated to Chico. According to an interview with Pam conducted last spring by Peer Leader Martha Roggli, the festival idea was conceived as a way for aspiring playwrights to see their work performed. Pam herself took the leap of faith shortly after moving to Chico. She started a playwriting class for OLLI without any previous playwriting experience. She devised a workbook from guides she’d studied herself, and she created an elementary outline for OLLI students to follow. It worked!

Two years later, Pam continues to lead “Writing the 10-Minute Play” for OLLI, and some of her new works have been performed at for both play festivals. A total of 16 plays have been produced thus far, also providing older adults with the chance (most for the first time) to act, including Pam.

If you’d like to learn more about playwriting and/or how to support next year’s summer festival, please contact the OLLI Office at 530-898-6679 or olli@csuchico.edu.

MEMBER OWNED, MEMBER OPERATED

OLLI is self-organized members working together to deliver educational and social opportunities for lifelong learners. Volunteers make OLLI happen—and they have fun in the process. Expanding our volunteer participation is our #1 goal. There’s a way for everyone to help.

The Advisory Council is comprised of six volunteer-led committees responsible for new class offerings, day trips, luncheons, peer leader support, and organizational planning, among other things. More than 200 volunteers spearhead as many projects and special activities. OLLI instructors are also volunteers, known as peer leaders. In 2015-16, 134 peer leaders led 263 classes.

Advisory Council members shown from left to right: Martha Roggli, Communications Chair-elect; Paul Moore, Membership Chair; Sydney Wilde, Curriculum Co-Chair; Mike McCluskey, AC Chair; William Tefettler, Facilities Chair; Tom LaBlanc, Communications Chair; Mary Brashears, Curriculum Co-Chair. Not pictured: Charney Herst, Events Chair; Russ Melquist, Fundraising Chair; Ann Nikolai, Program Director.

Want to learn more about volunteer opportunities? Please call Volunteer Liaison Gayle Womack at (530) 898-6679.