At the start of this new academic cycle, I am filled with expectation. My oldest daughter, Emma, started middle school in August, and my youngest, Greta, is now in third-grade. It seems like yesterday when our family arrived in Chico, an oversized U-Haul laboring in the first heat wave of June. A month later I started my job at OLLI. Now at the start of my sixth year as program director, I relish this time to reflect on recent achievements. I also enjoy looking ahead and mapping new directions.

This year, OLLI embarks on the development of a five-year strategic plan. Advisory Council Chairman Mike McCluskey, with some 30 years of planning experience, will utilize his skills and expertise to bring together OLLI members, community, and campus partners in mapping a future vision for OLLI and a plan for taking us there. He'll be inviting your input and participation along the way.

Before we jump ahead, the purpose and focus of my annual Director’s Report is to celebrate the recent milestones that got us here. In this report, I will review the 2016-17 fiscal year (July 1-June 30) and acknowledge the people who helped make it successful. The dedication of our volunteers, the creative spirit of our many partners, and the innovation and resourcefulness of our leadership team have all contributed to our growing reputation locally, regionally, and nationally.

We work hard, but I believe we’re successful because we care. Whether we volunteer to drive someone to class each week or commit our summer months to updating OLLI classrooms and equipment, OLLI Chico is comprised of some of the most compassionate and dedicated people I’ve ever known. It is my other family, where my girls have gained role models that inspire (and teach them cribbage!); where my husband can lead classes that challenge him in new ways; and where staff, volunteers, and my university colleagues have supported me in undertaking major challenges—personally and professionally—in our ongoing effort to make OLLI self-sustaining, while also preserving our strong heritage and sense of community.

As I watch my own family grow and mature, I also see OLLI stretching, reaching for what’s next. As a parent, it can be hard to let go and allow sufficient space for my girls to develop into their own unique selves. As the leader of this dynamic lifelong learning program, I also endeavor to strike a balance between asserting my own vision and empowering OLLI members to provide direction. It is in this latter effort through which OLLI, ultimately, will soar, and I am grateful for the opportunity to learn and grow with you on this journey.
HIGHLIGHTS

- 263 Classes
- 134 Peer Leaders
- 6 Business Sponsors
- $5k Grant awarded by Board of Governors of CSU, Chico Research Foundation
- Featured speaker at Osher Institutes National Conference
- Co-hosted national webinar on volunteerism through Osher national network
- Volunteer Mentoring Initiative earns national recognition for innovation
- Surpassed annual fundraising goal with a total of $25,952 contributed by 164 members, an increase of 67% over previous year
- Tripled business sponsorship goal, with $9,500 in contributions from six local businesses

2016-17 FINANCIAL OVERVIEW

Overall, OLLI generated more revenue than it spent in 2016-17, enabling the program to establish a reserve fund going into the new fiscal year. This is a positive trend we expect to expand on because we are still relying heavily on revenue generated from donations to cover expenses not fully met through earned income, like membership fees.

Total expenses were marginally less than originally budgeted, primarily because reimbursed time for staff dedicated to OLLI by Regional & Continuing Education (RCE) was less than anticipated. This difference helped offset the cost of two additional part-time OLLI employees: Michele Desmond, who coordinates office operations, and Gayle Womack, in charge of the business sponsorship program. In summary, the positive balance of operations at the end of the 2016-17 fiscal year was $19,135, of which $12.5k was transferred to the OLLI reserve fund. The rest was carried forward July 1, the start of the 2017-18 fiscal year, to help outfit the new Bradley 2 classroom and to cover operational expenses, like salaries and rent, during the summer months before income from fall registration is fully realized.

16-17 Actual Expenses: $292,973

- OLLI Staff Salary & Benefits: 54%
- RCE Reimbursed Time: 13%
- Marketing: 2%
- Admin Fees: 5%
- Operating Expenses: 7%
- Events & Meetings: 5%
- Fundraising Expenses: 1%

16-17 Actual Revenue: $300,282

- Osher Endowment Revenue: 35%
- Membership Fees: 49%
- Business Sponsorships: 3%
- Special Events: 4%
- Member Donations: 9%
- Interim Fee Income: 1%
REVIEWING OLLI FEE STRUCTURE

Members are often surprised to learn that membership fees cover only half the cost of operating OLLI. Endowment income from two Osher grants contribute another quarter of the total revenue pie, leaving a gap of approximately 25% made up through a combination of individual and business donations and special revenue-generating activities, like bus trips, intersession classes, and play festival ticket sales.

Over the past two years, OLLI has offered more trips and tours as a way of avoiding membership fee increases; however, trips and activities haven’t drawn as much interest as expected. Additionally, they take staff and volunteer time to organize. As a result, the Advisory Council is again looking at ways to raise membership fees with the least amount of negative impact on members. There are a variety of alternative fee models used by other OLLIs in the national network, and we are considering the potential pros and cons of some of these alternatives. These are the kinds of considerations you’ll be hearing more about as we begin our five-year planning process and continue to seek your input on effective ways to cover our costs while also keeping OLLI affordable.

COMMUNITY PARTNERSHIPS ENRICH OLLI CURRICULUM & OUTREACH

OLLI Business Sponsors help offset costs and bring people together.

In 2016-17, business sponsorships brought in $9,500 in revenue, offsetting the need to collect those dollars from membership fees and/or individual donations. But there’s another benefit. OLLI’s curriculum is expanding in new ways as a result of these partnerships through classes and activities that are meeting the demands of our adult learners, like Enloe’s Healthier You lecture series, financial and estate planning classes, and free hearing screenings to name a few.

In-kind donations from area businesses like Great Harvest Bread Co. and Beatniks Coffee House are also making it possible for OLLI to add more social engagement offerings. In August, 40 new members gathered at Beatniks, where the coffee house hosted a late afternoon gathering, providing a private room, plus appetizers and wine at no cost to OLLI. The Peer Leader/Host Orientation event was also sponsored (by Great Harvest), providing a chance for members to stay and mingle after the event—at no cost to OLLI.

Know of any local business leaders who might be interested in participating? In September, OLLI welcomed Cal Water as its newest sponsor. Gayle Womack, Community Outreach Coordinator, is currently working with Cal Water’s educational division to develop classes and/or workshops for the spring term. If you can think of a business, where both OLLI and its community partner can collaborate, let Gayle know by calling the OLLI office at (530) 898-6679.
LONG-RANGE PLANNING IS KEY TO LONG-TERM SUCCESS

Advisory Council Chairman Mike McCluskey launches Strategic Planning effort.

Last April at the Annual Business Meeting, Advisory Council Chairman and Peer Leader Mike McCluskey introduced the concept of a five-year Strategic Plan. Mike invited participants to share their future vision for OLLI in this first step of a one-year process. He led participants through a series of examples of what some other OLLIs are doing and encouraged OLLI Chico members to think “outside the box.” As a result, 150 “idea cards” were generated at the meeting and are being incorporated into a large database. When completed in April, OLLI will have a road map for where we want to go and how to get there.

“I hadn’t really thought about what OLLI could be,” said OLLI veteran Jeff Richards, who attended the April meeting. “Frankly, it’s a tough question. I like what OLLI is doing now,” Jeff explained, “but I’d also like to be sure OLLI continues to offer the kinds of classes and activities I like.” When prompted, he listed a few topics of interest not very well represented currently, including a desire for classes in math, science, and engineering.

“This is exactly the kind of response I’m looking for,” Mike said, after reading Jeff’s comments. With more than 30 years of planning experience in the public sector, Mike understands the value of getting stakeholders involved in the planning process—especially where longer-term decision-making is involved. “OLLI is a unique program in that our leadership really does value what members think,” he explained. “I’m hopeful that everyone will weigh in at some point in the planning process so that we end up with something that accurately reflects the thoughts and interests of all of our members.”

In what direction would you like to see OLLI go? Take a minute and complete Mike’s “Shaping the Future” survey, the first comprehensive survey of the strategic planning process. We’ll be gathering your comments through the end of November and will share the results at a Town Hall Meeting in the spring. We’ll also publish the results online so that you can follow along, if you’re unavailable to attend the meeting.

Want to get involved? Contact the OLLI office at olli.csuchico.edu or call us at (530) 898-6679.

ARTIST DONATES ORIGINAL WORKS FOR OLLI GALLERY OPENING

Bradley 2, the newly-renovated Craig Hall classroom, will feature a new gallery space for OLLI artists, thanks to a generous gift from OLLI member and Peer Leader Jim Kirks. Susan Proctor, local artist and former board member of the Janet Turner Print Museum, will showcase 25 of her original works in the space, one of which (pictured, left) will be raffled off at a special gallery opening event on November 28. “This program is full of creative people who should be celebrated,” Jim said. By underwriting the cost of the gallery hanging system and assembling a volunteer team to oversee the installation, Jim has opened a new door for OLLI. “His vision is contagious,” explained OLLI member Carol Cody, who, along with fellow members Maureen Fredrickson and Susan Proctor, is leading the gallery committee. “Our hope is to showcase the talent and achievements of our own members, while also improving the warmth and ambiance of our largest classroom.”
OLLI RECEIVES UNIVERSITY GRANT FOR 2018 PLAY FESTIVAL

University Foundation Board of Governors likes OLLI’s “learning laboratory” approach to 2018 festival.

In July, Mr. Ahmad Boura, Vice President for University Advancement and CEO of the University Foundation, notified OLLI Director Ann Nikolai that her grant application was selected for funding in the amount of $5,000 in support of the 2018 OLLI Play Festival. In his notification letter, Mr. Boura said, “Your project exemplifies our University’s mission and reputation for student-centered teaching and experiential learning. The Board of Governors selected your project from recommendations made by campus leadership, including the Provost, College Deans, and the Vice President for Student Affairs.”

The annual festival, inspiration of Peer Leader Pam Loyd, wrapped its third season in late June and continues to be a crowd pleaser. However, the production is a lot of work, and it is managed almost entirely by volunteers, many of whom have no previous theater experience.

“When Pam came to me four years ago with this crazy idea for OLLI to write, produce, and perform in its own original plays, I was skeptical,” Ann explained. “And while I wasn’t available to offer more than a minimum level of resources and support, I envisioned a day when we could tap into the talent and expertise of the University’s School of the Arts. The opportunity for mutual learning and growth here is such a natural fit.”

Last fall, Joe Alexander, Associate Dean of Humanities & Fine Arts (HFA), and Ann collaborated on the grant application to the University Foundation, identifying a variety of ways HFA faculty and students could provide support to actors and directors, while also creating a “teaching laboratory” for CSU students for whom theater is their primary field of study. Over the next several months, OLLI’s festival production team will be working with HFA faculty to develop learning opportunities for both kinds of students—CSU, Chico’s traditional students and OLLI’s “seasoned” adults. The goal is to enhance the festival experience for everyone involved by providing training and support leading up to the big show.

Thinking about submitting a play? Because the 2018 festival will be produced in the spring, the calendar of activities has been moved up, including play submission deadline, auditions, rehearsals, and the April performances. If you’re considering submitting a play for the spring festival, the due date is Friday, December 15 (last day of fall classes). Guidelines for Playwrights and the 2018 Play Festival Flyer are available in the OLLI office. Call (530) 898-6679 for more information.
OVERNIGHT EXPEDITION EXTENDS OLLI CLASSROOM EXPERIENCE

Camping trip builds friendships and survival skills.

In September, Peer Leader Lorna Cunkle led nine intrepid OLLI campers up an 11-mile gravel road from Chester to the very remote and beautiful Juniper Lake. The lake is the largest in Lassen Volcanic National Park, and it was an ideal destination for four days of camping, hiking, kayaking, and star-gazing. Participants are already planning ahead for more trips next summer. Stay-tuned for the OLLI Summer Class Schedule, due for publication in the spring.

OLLI MENTORING INITIATIVE EXPANDS TO HELP OSHER REENTRY SCHOLARS

Two CSU, Chico Osher programs converge to mutual gains.

Over the past two years, OLLI member and peer leader Roy Cook has developed the OLLI Mentoring Initiative to offer lifelong learning skills to help CSU, Chico students succeed at school and in the work place. Thirty OLLI members are currently enlisted as mentors, with 21 mentoring relationships underway. The initial focus of the program paired OLLI members with students from the Center for Entreprenueriship and Chico Start, a local incubator for start-up businesses. Last year, Roy took the program in a new direction, partnering with Dean Debra Barger and Jeff Layne in the offices of Regional & Continuing Education. Jeff oversees the Osher Reentry Scholarship endowment, an award, like the OLLI endowment, made possible by The Bernard Osher Foundation.
“The recipients of these scholarships are among the most deserving students at the University,” Jeff explained. “While the scholarship criteria focuses on reentry students who are returning to college after a large break in their studies, it also targets those who’ve experienced enormous hardship, like addiction, physical disability, or tragic loss.” By identifying OLLI mentors who can offer guidance and support, OLLI ties together two important Osher programs with a focus on non-traditional student populations and lifelong learning. Roy Cook is especially thrilled. “One of the best things I’ve ever experienced in my life is to be mentored and to mentor others. It changes lives,” Roy explained. “Working with Jeff and the Osher Scholars has added another dimension to the mentoring program and has been enormously rewarding for students and OLLI mentors alike.” To become involved in the OLLI Mentoring Initiative, contact Roy Cook at 123rsc@gmail.com.

“POETRY FOR PLEASURE” REFLECTS GENERATIONS OF LEADERSHIP

Prime Timers legacy continues to make its mark on OLLI curriculum.

Peer Leader Jim Kirks has led the Poetry for Pleasure class for six years. However, the same class has been in the OLLI class schedule for two decades. Started originally by Virginia Peterson in 1997, Poetry for Pleasure was then one of only a dozen classes on the Prime Timers’ schedule. For those newer to OLLI, the Prime Timers Learning-in-Retirement program was founded on the CSU, Chico campus nearly 30 years ago and evolved into an Osher institute as a condition of the first endowment award in 2007. The Prime Timers legacy remains influential, largely through OLLI’S continued focus on volunteerism and member-driven classes.

After Virginia “retired” from her leadership of the poetry class, George Davis, then a Prime Timers’ member, stepped into the role. In 2003, Jim Kirks joined Prime Timers and eventually enrolled in the class. When George was ready to move on a few years later, he tapped Jim to take his place. As head of the North State Library for 27 years prior to his retirement, Jim had a deep appreciation for literature, but never imagined himself leading a class on poetry. “There was a time in my life when I wrote poetry inspired by a woman I was then courting.” Jim explained. One of these poems even became the inspiration for an elementary school mural. “That was a long time ago,” Jim continued. “Until George’s class, I’d totally stopped writing or reading poetry.”

The longevity of the class is owed to its motto: poetry for pleasure, according to Virginia Peterson, who was interviewed by phone for this story. “I started the class 20 years ago with some guiding principles,” she explained. “No poems by amateurs, no showboats, and always take turns.” Sisters Ramona Peters and Lucille Schell, also contacted for comments, confirmed Virginia’s assumption. “We started this class together as friends and that bond was always reflected in a core group of members, many of whom attended for years,” said Ramona.

In the relatively short time since Jim took over for George six years ago, more than 100 OLLI members have enrolled in the class, bringing a new poem each class meeting to share with the group. According to Ramona, some participants weren’t huge fans of poetry before attending the class. “My appreciation for poetry grew as I was exposed to such a wide range of poems,” she shared. Lucille

OLLI Mentor Sherri Faroky talks with students at the Center for Entrepreneurship.
echoed her sister’s enthusiasm. “Reading the poems aloud was especially satisfying. I liked poetry as a girl, but the class helped us all connect in a way we wouldn’t have otherwise.”

Current Peer Leader Jim Kirks said he especially loves the diversity of writings he’s encountered as a result of the class. “The spirit of this class encourages research and exploration,” Jim explained. “In all the time I’ve led the class, only one poem has ever been repeated.” It is this novelty—throughout all of the years the class has been offered by different leaders—that keeps Poetry for Pleasure relevant and inspires fresh leadership over the years.

BUILDING AN OLLI CAMPUS, ONE CLASSROOM AT A TIME

Craig Student Living supports intergenerational “campus” concept.

Some people know how to take summer vacation—but not the OLLI Facilities Committee volunteers! Chairman William Tefeteller and committee members Myron Flindt, Jerry Dunham, and Lois Olsen dedicated a combined total of 500 hours over the summer preparing our newest OLLI classroom, Bradley 2, with 130 comfy seats, and providing audio-visual training and support for fall peer leaders. Special kudos go to Robert Van Bokkelen and Bruce Nikolai, who also offered assistance when they could. The new room provides greater capacity than other venues, and it keeps members from charging across town to attend these popular lectures. Jon Timko, Community Manager for the Craig Student Living complex, is eager to make OLLI members feel at home at Craig. At the OLLI Class Preview in August, Jon thanked OLLI members and shared his vision for an intergenerational “campus.” Said Jon, “Our younger students benefit from having OLLI share this facility, and we want OLLI members to feel a part of the Craig family and know they’re appreciated.” He also announced new OLLI meal and coffee specials! Additionally, five accessible parking spots and six additional reserved spots were added outside Bradley 1, and the available overflow lot will be leveled and new lighting added to assist through the darker months.

Top Row:
• Bruce Nikolai, Jerry Dunham, and William Tefeteller install a large new projector screen in Bradley 2.
• Bradley 2 before & after photos.
• Our new chairs are so comfy!

Bottom Row:
• New reserved parking spaces added at Craig Hall.
• The OLLI-You-Can-Eat Lunch Special means less driving and more learning.
• Carol Cody, Myron Flindt, Bruce Nikolai, Jerry Dunham, and William Tefeteller install gallery hardware for the new art space in Bradley 2.