



# OLLI

*where learning never retires...*

**Osher Lifelong Learning Institute at CSU, Chico**

**[olli.csuchico.edu](http://olli.csuchico.edu)**

## 2019-20 ANNUAL PLAN

The purpose of this Annual Plan is to identify, communicate, and establish 2019-20 targets for key goals and objectives in support of OLLI's organizational mission and its strategic priorities. FY20 represents the second year of a five-year Strategic Plan, launched last year. By outlining key priorities, including detailed action steps and targeted completion dates, it is the intent of the Annual Plan to guide and support OLLI leaders (staff and volunteers) in advancing this lifelong learning program to better serve the interests of its members now and in the future. Curious to know how the 2019-20 Annual Plan supports the five-year strategic plan? [Review the 2019-23 Strategic Plan](#) online or visit the OLLI website at [olli.csuchico.edu/about-olli](http://olli.csuchico.edu/about-olli) to link to the report.

### **A Focus on Program Sustainability: Looking Back at FY19**

The long-term sustainability of OLLI continued to be a central focus of 2018-19. The implementation of the Strategic Plan, another fee increase, and legacy gift commitments from three OLLI families in honor of OLLI's 30<sup>th</sup> anniversary highlighted a shift from a focus on day-to-day operations to a broader, more comprehensive commitment to OLLI's long-term future. Additionally, the OLLI Reserve Fund, to which no contribution was made last year, saw a bump in the right direction, with \$33k deposited in FY19 and a forecast for another jump in FY20. OLLI experienced a drop in overall memberships for the second year in a row, largely attributed to the fee increases both years. An additional focus on outreach and recruitment was ramped up to help close the gap in member turnover.

Annual fundraising grew, exceeding the FY19 goal by 20%. This was largely a result of increased cultivation by OLLI's outreach coordinator in all three fundraising areas: individual gifts, business sponsorships, and legacy/estate gifts. Importantly, the number of individual large gifts (\$1,000 or greater) and recurring gifts grew; however, this growth was supported by fewer participating donors (10% in FY19 compared to 12% in FY18), a trend we'd like to reverse in the coming years.

A newly restructured Advisory Council format was productive, with five new members serving alongside eight continuing members. Monthly meetings operate as workshops, where AC members work in groups to advance individual projects. This hands-on engagement, in addition to regular financial reports and policy-making, has proven to be both productive and gratifying, with volunteer leaders taking ownership of some of OLLI's most important initiatives.

OLLI's primary classroom complex changed ownership and transitioned in the spring from Craig Student Living to The Social Chico. So far, the change in ownership has not disrupted OLLI classes, other than ongoing renovations to the facility. As part of the developing Facilities Master Plan, and in response to this shift in management, OLLI actively pursued new classroom options. The first was through a group of developers for Valley's Edge, a 1,400-acre community immediately north of Skyway and Honey Run Rd. The focus of this community is on intergenerational living, with plans in place for a community center in which OLLI classrooms would be located. Chico Area Recreation Department (CARD) also included OLLI in workshops and focus groups as it refines its own curriculum to better accommodate older adults, including classroom options for OLLI. In the fall, OLLI opened the doors to its new offsite Service Desk at the former Craig Student Living. While hours of operation are limited,

the feedback from members has been extremely positive. Our challenge going forward is to staff the service desk more regularly through a combination of staff and volunteers.

## 2019-20 Priorities

OLLI's major priority is to continue the evolution of a truly great lifelong learning experience for its members. This can be achieved by ensuring we offer the kinds of classes and activities members want in locations that are comfortable, accessible, and enhance the learning experience. OLLI Chico also prides itself on being affordable. We offer educational programming at a competitive price, and we want to continue to do so while also ensuring the long-term sustainability of the program. Balancing these interests is a priority again for 2019-20, with specific financial and growth targets. Expanded outreach to prospective members and improved retention practices are additional priorities that impact revenue. Ongoing recruitment of key volunteer leaders ensures that OLLI can move key initiatives forward and enables the program to expand the breadth and scope of what it can do without incurring additional human resource costs.

The Program Director, in collaboration with the Advisory Council, has identified **five goals** for the 2019-20 academic year. They are: **(1)** Meet Quality of Life expectations of OLLI members; **(2)** Enhance teaching and learning opportunities for OLLI members; **(3)** Implement Facilities Master Plan; **(4)** Reach 1,200 members by end of the fiscal year; **(5)** Achieve budgeting goals that support programming objectives and build reserve.

### Goal 1: Meet Quality of Life expectations of OLLI members

**Ref. 2018-23 Strategic Plan, Strategic Initiative 3: Maintain member satisfaction levels at or above 90%**

**Background:** As a member-driven program, with volunteer instructors and volunteer leaders, OLLI's programming and services generally reflect the priorities of its membership. With half of its members 70 years or better, issues like hearing and sight loss, as well as greater susceptibility to scams like robocalls, are a growing reality and deserve attention. By making this category of learning and understanding an official annual goal, OLLI hopes to dig deeper through campus and community partnerships, bringing helpful information to light as a result, and eventually becoming a trusted resource for older adults in the Chico and surrounding areas.

**Objective 1:** Evaluate and enhance current social engagement opportunities at OLLI Chico

**Objective 2:** Become a resource for the community on key issues that affect older adults, e.g. elder abuse, robocalls, etc.)

**Objective 3:** Improve hearing capability in the OLLI classrooms

**Objective 4:** Demonstrate greater sensitivity to sight-impaired members by adopting new procedures for dimming and raising lights, for example

**Objective 5:** Work to ensure accessibility for all OLLI classrooms

### Goal 2: Enhance teaching and learning experience for members

**Ref. 2018-23 Strategic Plan, Strategic Initiative 3: Maintain member satisfaction levels at or above 90%**

**Background:** Improving the quality of a lifelong learning experience for all OLLI members is no simple task. OLLI means different things to different people. OLLI Chico member satisfaction surveys show members have interests in a vast array of subjects, both academic and non-academic oriented. Members want to be intellectually stimulated, demonstrating great affection for peer leaders with years of teaching experience. Members also want to stay fit and improve their quality of life through healthy diets, exercise, and mindfulness practice. To plan for continuity of existing high-demand classes; to increase diversity awareness and tolerance; and to develop the breadth and depth of

class offerings desired by members, we need to be more proactive in recruiting dynamic volunteers to lead classes in popular subject areas.

**Objective 1:** Add Five New Classes in Vital Areas of Interest

**Objective 2:** Propose at least two new kinds of innovative classes and/or activities that are consistent with the lifelong learning interests of OLLI Chico members and offer new opportunities to enhance learning

**Objective 3:** Submit proposals for at least three classes taught by a person of color and/or representing foreign history or culture(s)

**Objective 4:** Book at least one trip in FY20 through Overseas Adventure Travel

**Objective 5:** Cultivate two new campus partnerships

**Objective 6:** Cultivate two new community partnerships

**Objective 7:** Develop library of self-help video tutorials and other resources for peer leaders and classroom hosts

**Objective 8:** Review current member satisfaction survey and lapsed members survey to ensure constructive questions are being posed in order to maximize usefulness of the data

**Objective 9:** Develop and implement program evaluation tools

**Tactic 1:** Develop and implement class evaluation survey

**Tactic 2:** Develop and implement classroom/support survey

### **Goal 3: Implement Facilities Master Plan**

**Ref. 2018-23 Strategic Plan, Strategic Initiative 2: Secure long-term facility to meet needs of a majority of OLLI classes and to provide a campus-like setting to foster and accommodate growth and build strong community**

**Background:** Moderate membership growth is a priority in OLLI's five-year strategic plan. The Facilities Master Plan is a tool to both support capital project programming decisions and to facilitate ongoing space management to help OLLI move toward a *rightsized* campus. Given the change in ownership at The Social Chico, OLLI's long-term future at the former Craig Student Living complex is uncertain and more incentive to have a Plan B on where to host a majority of OLLI's 260+ classes each year. This comprehensive plan will help ensure our lifelong learning program can proactively respond to the needs of its members.

**Objective 1:** Meet with new owners at The Social Chico to get a better understanding of their future vision

**Objective 2:** Complete FY19 Space Capacity Analysis

**Objective 3:** Nurture relationship with Valley's Edge development team

**Objective 4:** Nurture relationship with CARD as they prioritize lifelong learning opportunities for active adults

**Objective 5:** Factor in space for prospective Chapter memberships (Red Bluff)

### **Goal 4: Reach 1,200 members by the end of the year**

**Ref. 2018-23 Strategic Plan, Strategic Initiative 1: Increase dues-paying memberships by 5% annually to approximately 1,500 in five years**

**Background:** For the second year in a row, OLLI experienced a drop in total memberships in FY19, from a high point in FY17 of 1,200 to present membership count of fewer than 1,100. Two membership fee increases over the past two years contributed to drop in the rate of new members joining OLLI, as well as increase in number of

members not returning. With no fee increase planned for FY20, a new payment plan option, and expanded marketing and advertising planned for F'19, OLLI plans to get back on track to meet its 2023 goal of 1,500 members.

**Objective 1:** Reduce churn from 38% in FY19 to 30% in FY20

**Objective 2:** Collect fees from non-paying members

**Objective 3:** Review existing marketing/outreach materials. Update as needed.

**Objective 4:** Expand outreach efforts. Find new prospects.

**Objective 5:** Pursue new chapter options

## **Goal 5: Achieve budgeting goals that support programming objectives and build reserve**

**Ref. 2018-23 Strategic Plan, Strategic Initiative 4: Establish annual balanced budget that supports an operating reserve in the amount of 50% of estimated expenses and reduces contribution to operating account from Annual Fund to 50% of total donations.**

**Background:** OLLI Chico prides itself on being one of the most affordable Osher Lifelong Learning programs in the country. We achieve this status by controlling expenses and by relying on volunteers, individual donors, and the support of two \$1 million endowments. But it's not enough to support a "rainy day" fund. Without that financial cushion, OLLI is vulnerable. With an adequate operating reserve in place, OLLI can focus on delivering high-quality services and programs; act on unanticipated opportunities; minimize short-term, crisis-based decisions; and demonstrate the kind of financial stability that instills donor confidence. Over the next five years, our goal is to support an operating reserve in the amount of 50% of estimated annual expenses.

**Objective 1:** Update five-year budget to support goal of 50% reserve of annual expenses by 2023

**Objective 2:** Set new fundraising goals for individual gifts, business sponsorships, and estate/legacy gifts

**Objective 3:** Book at least one trip in FY20 through Overseas Adventure Travel

**Objective 4:** Identify at least one other revenue-generating initiative

**Objective 5:** Pursue creation of new Red Bluff chapter in partnership with Tehama Together

**Objective 6:** Assess resources to support Intersession programming

**Objective 7:** Explore evening/lunch-hour classes for OLLI members and general public