2019 Annual Business & Town Hall Meeting
Advisory Council

- Betty Bilbo
- Mary Brashears
- Louise Cummins
- Michele Desmond
- Jerry Dunham
- Myron Flindt
- Paul Moore
- David Price
- Sara Simmons
- William Tefteller
- Debbie Vermette
- Sydney Wilde
- Gayle Womack
NRC Benchmarking Data
The Range of OLLIs

Membership Size

500

13,000+
The Range of OLLIs

- 2-3 Week Terms, twice annually
- Course Term Length
- 14 Week Terms, four times annually
The Range of OLLIs
National Role Model

Today’s Presenters:

Michelle Sierpina, PhD
Founding Director
OLLI @ University of Texas Medical Branch

Ann Nikolai
Program Director
OLLI @ California State University, Chico

Debra Herman
Director
OLLI @ Florida State University

Osher Lifelong Learning Institute at CSU, Chico
Essential Elements of an Osher Institute Policies and Procedures Document

A well-crafted Policies and Procedures document supports the healthy, productive, and positive operation of a Lifelong Learning Institute. Such documents provide explicit statements of an Institute’s mission, values, and goals. They also clearly define the roles and responsibilities of the four distinct constituencies of the program: students, faculty, volunteers, members, and administrators.

Outlined below are the essential elements of a Policies and Procedures document. Also provided, are some of the reasons for including these elements and/or as a prompt for healthy discussion within the Institute. As additional resources, two examples are provided to consider.

“....I hope you consider the many NRC requests of you as a compliment on the level of work you do. It is true! We sometimes will say, "Who does xxx really well? ...besides Chico?"
Campus Partnerships
Campus Partnerships
Campus Partnerships
A Brighter OLLI is an Engaged OLLI
WHERE FITNESS IS A RESORT
Do members get what they want?

How satisfied are you with your OLLI experience?

- **Very Satisfied**
- **Satisfied**
- **Not Satisfied**
National Sample

How satisfied are you with your OLLI experience?

- Very Satisfied
- Satisfied
- Not Satisfied
Levels of Attrition

[Chart showing the percentage of attrition at different levels: 5%, 10%, 15%, 20%, 25%, 30%, 35%, 40%, 45%]
2019 Lapsed Member Survey

- **COST**
- **CONFLICTING INTERESTS**
- **HEALTH**
- **TRANSPORT**
## 2018-19 Operating Budget Trend: REVENUE

<table>
<thead>
<tr>
<th>EARNED REVENUE</th>
<th>FY 2018-19 BUDGET</th>
<th>FY 2018-19 FORECAST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Fees</td>
<td>$221,905</td>
<td>$193,345</td>
</tr>
<tr>
<td>Intersession Lecture Revenue</td>
<td>$3,500</td>
<td>$1,775</td>
</tr>
<tr>
<td>Activities</td>
<td>$16,740</td>
<td>$12,970</td>
</tr>
<tr>
<td>Luncheons</td>
<td>$3,500</td>
<td>$3,980</td>
</tr>
<tr>
<td><strong>TOTAL EARNED REVENUE</strong></td>
<td>$245,645</td>
<td>$212,070</td>
</tr>
<tr>
<td>CONTRIBUTED REVENUE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment Earnings</td>
<td>$105,860</td>
<td>$105,860</td>
</tr>
<tr>
<td>Business Sponsorship Donations</td>
<td>$16,500</td>
<td>$16,500</td>
</tr>
<tr>
<td><strong>TOTAL CONTRIBUTED REVENUE</strong></td>
<td>$122,360</td>
<td>$122,360</td>
</tr>
<tr>
<td><strong>TOTAL REVENUE</strong></td>
<td>$368,005</td>
<td>$334,430</td>
</tr>
</tbody>
</table>
## 2018-19 Operating Budget Trend: EXPENSES

<table>
<thead>
<tr>
<th>Description</th>
<th>FY 2018-19 Budget</th>
<th>FY 2018-19 Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALARY &amp; BENEFITS - OLLI Only</td>
<td>$195,692</td>
<td>$191,680</td>
</tr>
<tr>
<td>RCE Direct &amp; Reimbursed Time</td>
<td>$50,919</td>
<td>$38,566</td>
</tr>
<tr>
<td>RENT-FACILITIES</td>
<td>$42,241</td>
<td>$41,578</td>
</tr>
<tr>
<td>MARKETING</td>
<td>$6,200</td>
<td>$3,500</td>
</tr>
<tr>
<td>EVENTS, MEETINGS</td>
<td>$22,645</td>
<td>$20,698</td>
</tr>
<tr>
<td>OFFICE EXPENSES</td>
<td>$16,781</td>
<td>$14,699</td>
</tr>
<tr>
<td>CLASSROOM EXPENSES</td>
<td>$1,450</td>
<td>$1,450</td>
</tr>
<tr>
<td>FUNDRAISING EXPENSES</td>
<td>$5,050</td>
<td>$5,050</td>
</tr>
<tr>
<td>ADMIN FEE</td>
<td>$21,477</td>
<td>$19,080</td>
</tr>
<tr>
<td><strong>TOTAL OPERATIONAL EXPENSES</strong></td>
<td>$362,455</td>
<td>$336,301</td>
</tr>
</tbody>
</table>
The Range of OLLIs
The Range of OLLIs

Low ~$130

Membership & Fees

High ~$800
Monetary Compensation for Courses/Classes

Percent by responding Institutes

- Community experts for monetary compensation: 14%
- Community experts for no compensation: 15%
- University/College faculty or graduate student for monetary compensation: 15%
- University/College faculty or graduate student for no compensation: 15%
- Members for monetary compensation: 9%
- Members for no compensation: 32%

38% Compensate
62% Don’t compensate

Osher NRC
## 2018-19 Operating Budget Trend: BALANCE

<table>
<thead>
<tr>
<th></th>
<th>FY 2018-19 BUDGET</th>
<th>FY 2018-19 FORECAST</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL REVENUE</td>
<td>$ 368,005</td>
<td>$ 334,430</td>
</tr>
<tr>
<td>TOTAL EXPENSES</td>
<td>$ 362,455</td>
<td>$ 336,301</td>
</tr>
<tr>
<td>RESERVE EXPENSE</td>
<td>$ 10,000</td>
<td>$ 10,000</td>
</tr>
<tr>
<td>OPERATING BALANCE</td>
<td>$ (4,450)</td>
<td>$ (11,871)</td>
</tr>
</tbody>
</table>

### DONATIONS

<table>
<thead>
<tr>
<th></th>
<th>FY 2018-19</th>
<th>FY 2018-19</th>
</tr>
</thead>
<tbody>
<tr>
<td>DONATIONS</td>
<td>$ 25,000</td>
<td>$ 35,000</td>
</tr>
<tr>
<td>CURRENT YEAR RESERVE</td>
<td>$ 10,000</td>
<td>$ 10,000</td>
</tr>
<tr>
<td>2017-18 RESERVE</td>
<td>$ 17,479</td>
<td>$ 19,091</td>
</tr>
<tr>
<td>TRANSFER TO OPERATIONS</td>
<td>$ (4,450)</td>
<td>$ (11,871)</td>
</tr>
<tr>
<td>ENDING BALANCE</td>
<td>$ 48,029</td>
<td>$ 52,220</td>
</tr>
</tbody>
</table>
Fundraising: Funds Generated

Percent by reporting Institutes

- $0-$4,999
- $5,000-$9,999
- $10,000-$24,999
- $25,000-$49,999
- $50,000-$74,999
- $75,000-$99,999
- $100,000-$149,999
- $200,000 or more
## OLLI 2018-19 FORECAST vs 2019-20 BUDGET

<table>
<thead>
<tr>
<th></th>
<th>FY 2018-19 FORECAST</th>
<th>FY 2019-20 BUDGET</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EARNED REVENUE</strong></td>
<td>$ 212,070</td>
<td>$ 217,640</td>
</tr>
<tr>
<td><strong>CONTRIBUTED REVENUE</strong></td>
<td>$ 122,360</td>
<td>$ 125,000</td>
</tr>
<tr>
<td><strong>TOTAL REVENUE</strong></td>
<td>$ 334,430</td>
<td>$ 342,640</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td>$ 346,301</td>
<td>$ 372,495</td>
</tr>
<tr>
<td><strong>TRANSFER FROM RESERVES</strong></td>
<td>$ 11,871</td>
<td>$ 29,855</td>
</tr>
<tr>
<td><strong>DONATIONS</strong></td>
<td>$ 35,000</td>
<td>$ 30,000</td>
</tr>
<tr>
<td>CURRENT YEAR RESERVE</td>
<td>$ 10,000</td>
<td>$ 26,000</td>
</tr>
<tr>
<td>PRIOR YEAR RESERVE</td>
<td>$ 19,091</td>
<td>$ 52,220</td>
</tr>
<tr>
<td>TRANSFER TO OPERITIONS</td>
<td>$ (11,871)</td>
<td>$ (29,885)</td>
</tr>
<tr>
<td><strong>ENDING BALANCE</strong></td>
<td>$ 52,220</td>
<td>$ 78,335</td>
</tr>
</tbody>
</table>
2018-19 ANNUAL PLAN

The purpose of this Annual Plan is to identify, communicate, and establish 2018-19 targets for key goals and objectives in support of OLLI’s organizational mission and the strategic priorities of CSU, Chico and the department of Regional & Continuing Education (RCE). FY19 represents the first year of a five-year Strategic Plan, led by former Advisory Council Chair Mike McCluskey and the Strategic Planning Task Force. Mike has been instrumental in getting volunteer members of the Advisory Council and others to become more involved in helping to shape OLLI’s future, and the multi-year planning process demonstrates a new level of engagement and buy-in by staff and volunteers alike. 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 2018-19 Annual Plan supports the five-year strategic plan? Review the 2019-23 Strategic Plan online or visit the OLLI website at olli.csuchico.edu. Look for “About OLLI” in the green menu bar on the OLLI Home Page.

A Focus on Program Sustainability: Looking Back at FY18

The long-term sustainability of OLLI was a central focus of 2017-18. A convening of the Strategic Planning Task Force, the research and implementation of a revised fee structure, and the securing of two large, multi-year gifts highlighted a shift from a focus on day-to-day operations to a broader, more comprehensive commitment to
2018-19 Priorities Summary

Goal 1: Increase dues-paying memberships
Goal 2: Conduct Space Capacity Analysis (SCA)
Goal 3: Add Five New Classes in Vital Areas of Interest
Goal 4: Establish an Innovations Team for program enrichment
Goal 5: Improve Member Support & Social Engagement Options
Goal 6: Develop and Implement Program Evaluation Tools
Goal 7: Establish balanced budget that supports an operating reserve
Goal 1: Increase dues-paying memberships

Goal 2: Conduct Space Capacity Analysis (SCA)

Goal 3: Add Five New Classes in Vital Areas of Interest

Goal 4: Establish an Innovations Team for program enrichment

Goal 5: Improve Member Support & Social Engagement Options

Goal 6: Develop and Implement Program Evaluation Tools

Goal 7: Establish balanced budget that supports an operating reserve
Valley’s Edge Presentation

OLLI Faculty Lecture Series Class

Monday, April 22
1—2:30pm
Bradley 2

Keynote Speaker: Seema Sehrawat
Guest: Bill Brouhard
Fun Over 50 Fitness

FUNctional Fitness

An engaging and energetic low-impact exercise program designed to provide a full body workout.

T/Th | 10:45 - 11:45 AM | ages 55+

READ MORE »
2018-19 Priorities Summary

Goal 1: Increase dues-paying memberships
Goal 2: Conduct Space Capacity Analysis (SCA)
Goal 3: Add Five New Classes in Vital Areas of Interest
Goal 4: Establish an Innovations Team for program enrichment
Goal 5: Improve Member Support & Social Engagement Options
Goal 6: Develop and Implement Program Evaluation Tools
Goal 7: Establish balanced budget that supports an operating reserve
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 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 30th 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 between 2016 and 2018, received a $23,000 deposit in FY19 and earned $4,315 from the investments.
## 2019-20 Suggested Priorities

<table>
<thead>
<tr>
<th>Goal 1:</th>
<th>Meet Quality of Life expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal 2:</td>
<td>Enhance teaching/learning experience for members</td>
</tr>
<tr>
<td>Goal 3:</td>
<td>Implement Facilities Master Plan</td>
</tr>
<tr>
<td>Goal 4:</td>
<td>Reach 1,200 members by the end of the year</td>
</tr>
<tr>
<td>Goal 5:</td>
<td>Achieve budgeting goals that support programming objectives and build reserve</td>
</tr>
</tbody>
</table>