

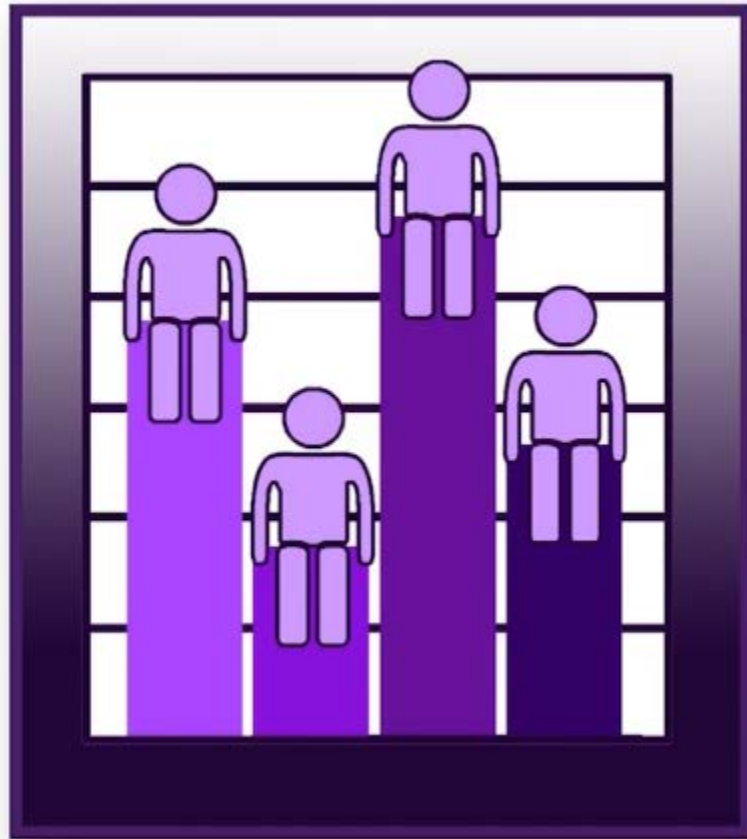


2019 Annual Business & Town Hall Meeting

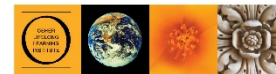
Advisory Council

- 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

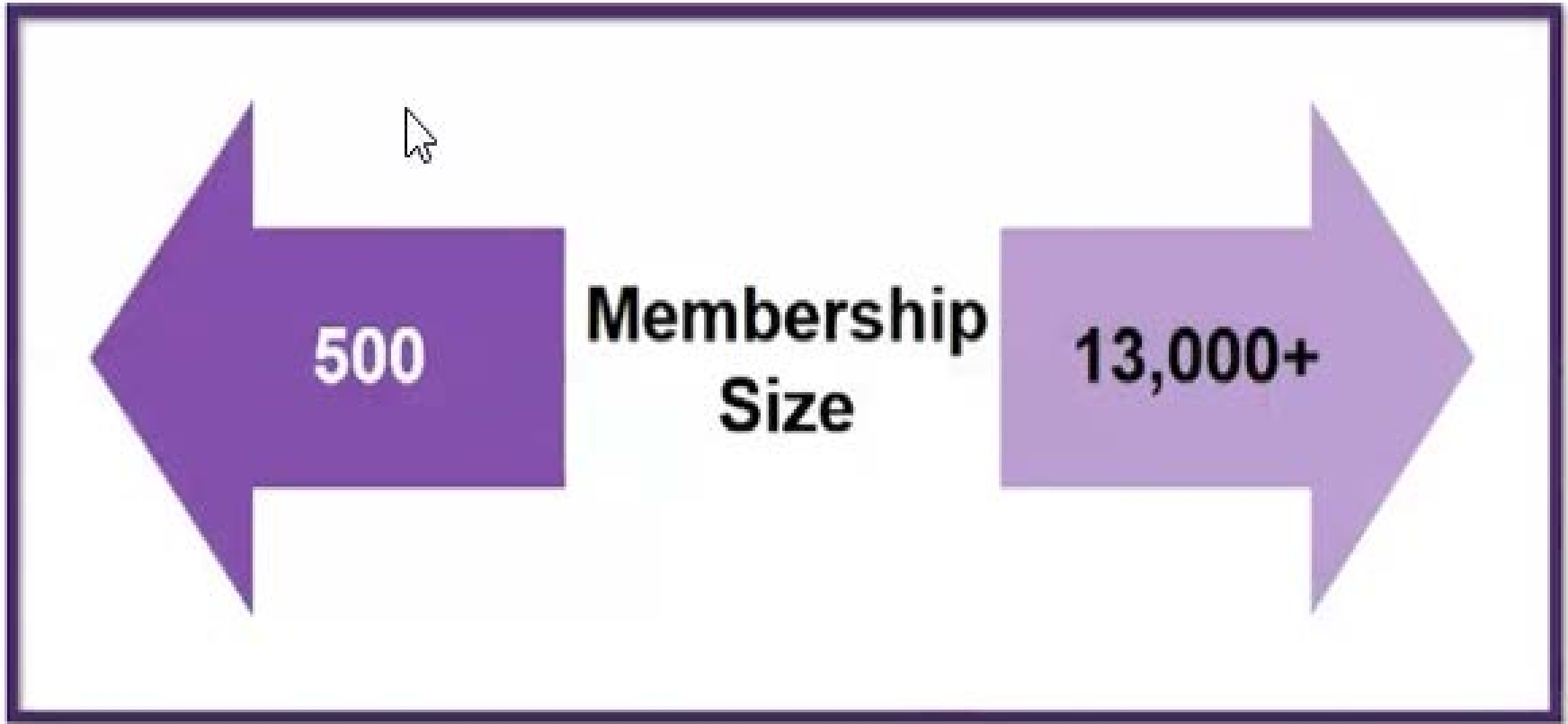
NRC Benchmarking Data



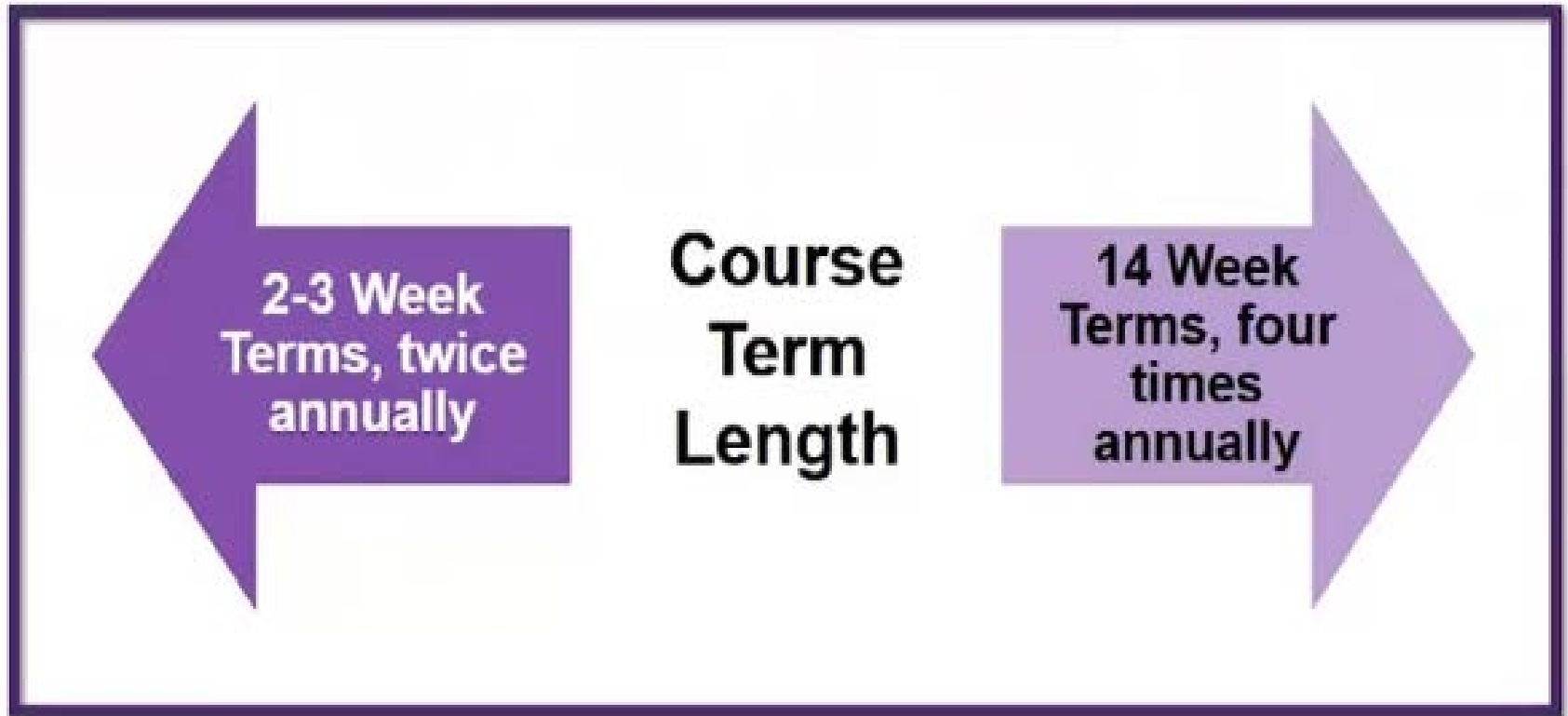
2018 Osher Institutes Benchmarking Data



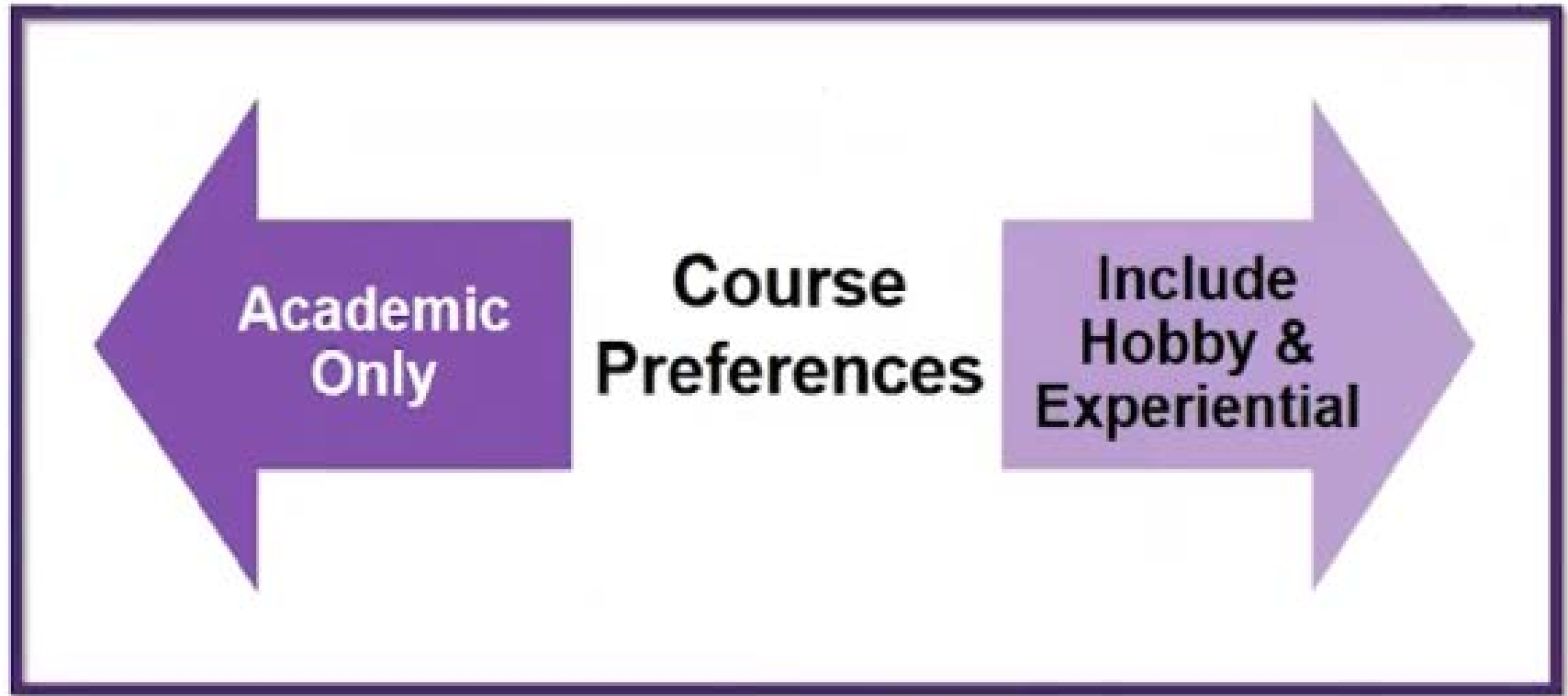
The Range of OLLIs



The Range of OLLIs



The Range of OLLIs



National Role Model

Today's Presenters:



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



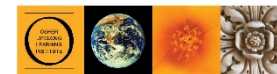
Ann Nikolai
Program Director
OLLI @ California State
University, Chico



Debra Herman
Director
OLLI @ Florida State
University

2019 Webinar

Osher NRC



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Osher NRC

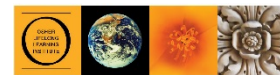
National Resource Center
for Osher Institutes

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, name, and purpose. They also clearly define the roles and responsibilities of the four distinct constituencies of the program: faculty, staff, volunteers, members, and administrators.

Outlined below are the essential elements of such a document. Also provided, are some of the reasons why such a document is needed and/or as a prompt for healthy discussion within the Institute. As additional resources, two sample documents in this paper are provided as examples 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



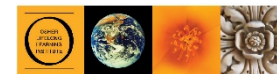
Campus Partnerships



Campus Partnerships



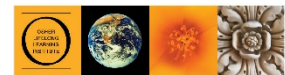
A Brighter OLLI is an *Engaged* OLLI



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WHERE FITNESS
IS A RESORT

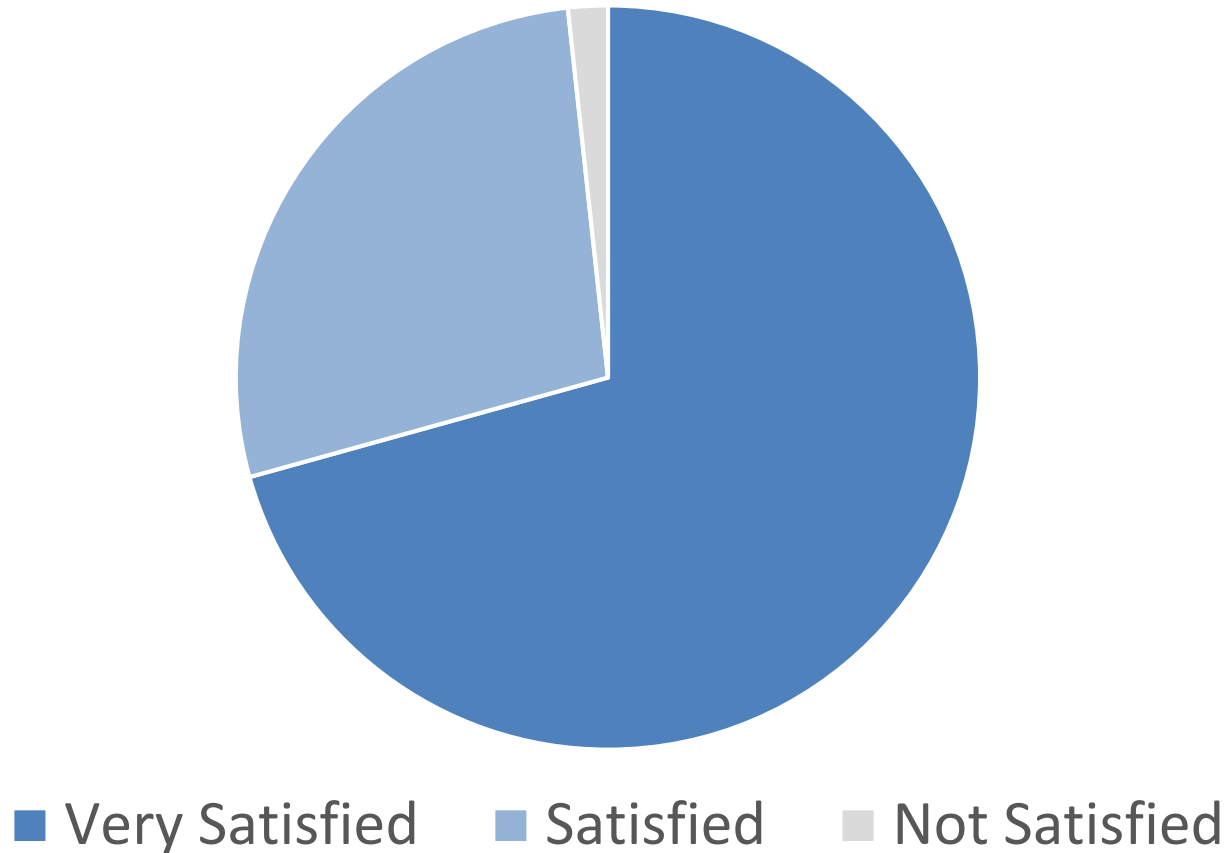


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Do members get what they want?

How satisfied are you with your OLLI experience?



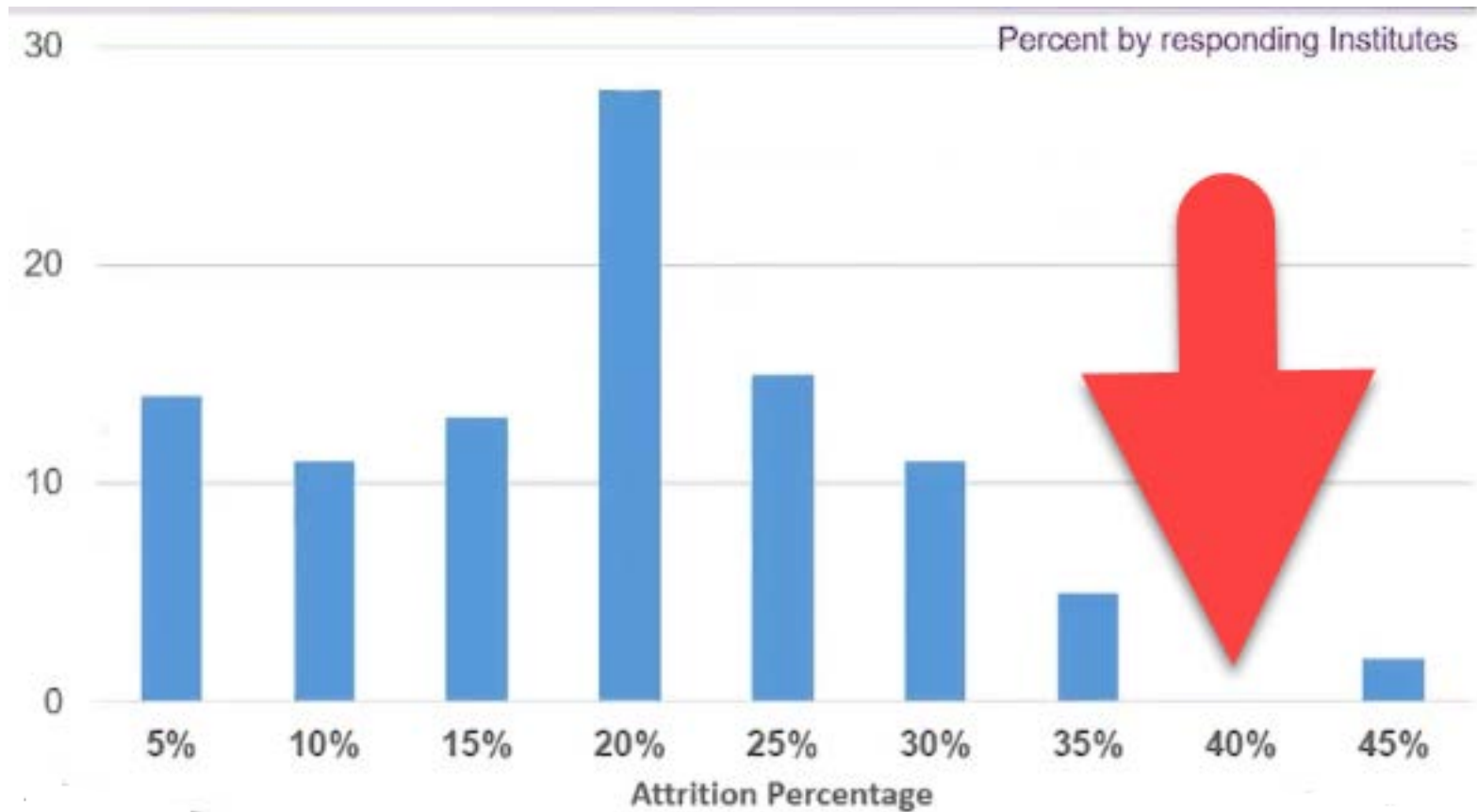
National Sample

How satisfied are you with your OLLI experience?



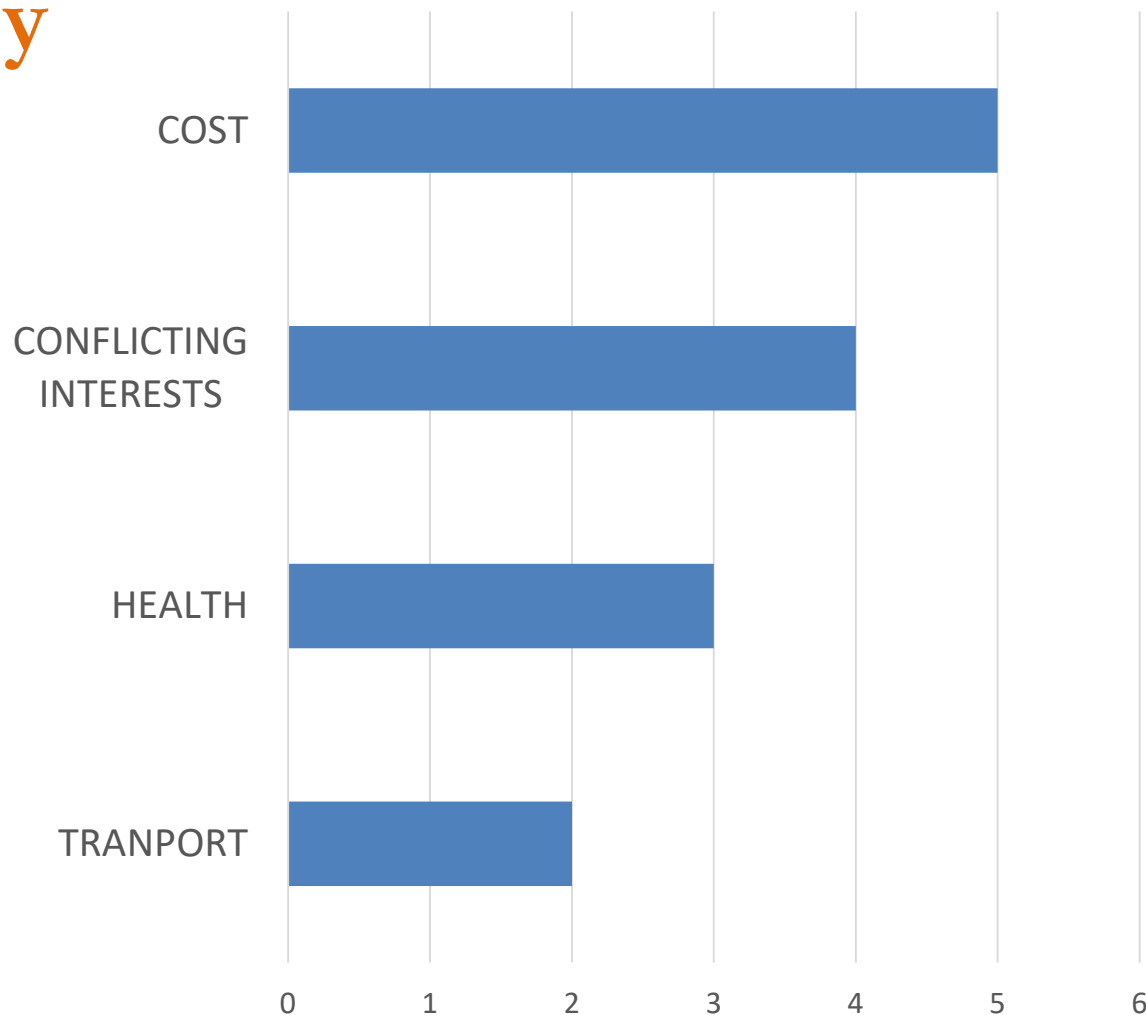
■ Very Satisfied ■ Satisfied ■ Not Satisfied

Levels of Attrition



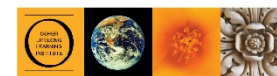
2019 Lapsed Member Survey

REASONS



2018-19 Operating Budget Trend: REVENUE

	FY 2018-19 BUDGET	FY 2018-19 FORECAST
EARNED REVENUE		
Membership Fees	\$ 221,905	\$ 193,345
Intersession Lecture Revenue	\$ 3,500	\$ 1,775
Activities	\$ 16,740	\$ 12,970
Luncheons	\$ 3,500	\$ 3,980
TOTAL EARNED REVENUE	\$ 245,645	\$ 212,070
CONTRIBUTED REVENUE		
Endowment Earnings	\$ 105,860	\$ 105,860
Business Sponsorship Donations	\$ 16,500	\$ 16,500
TOTAL CONTRIBUTED REVENUE	\$ 122,360	\$ 122,360
TOTAL REVENUE	\$ 368,005	\$ 334,430



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2018-19 Operating Budget Trend: EXPENSES

	FY 2018-19 BUDGET	FY 2018-19 FORECAST
SALARY & BENEFITS - OLLI Only	\$ 195,692	\$ 191,680
RCE Direct & Reimbursed Time	\$ 50,919	\$ 38,566
RENT-FACILITIES	\$ 42,241	\$ 41,578
MARKETING	\$ 6,200	\$ 3,500
EVENTS, MEETINGS	\$ 22,645	\$ 20,698
OFFICE EXPENSES	\$ 16,781	\$ 14,699
CLASSROOM EXPENSES	\$ 1,450	\$ 1,450
FUNDRAISING EXPENSES	\$ 5,050	\$ 5,050
ADMIN FEE	\$ 21,477	\$ 19,080
TOTAL OPERATIONAL EXPENSES	\$ 362,455	\$ 336,301

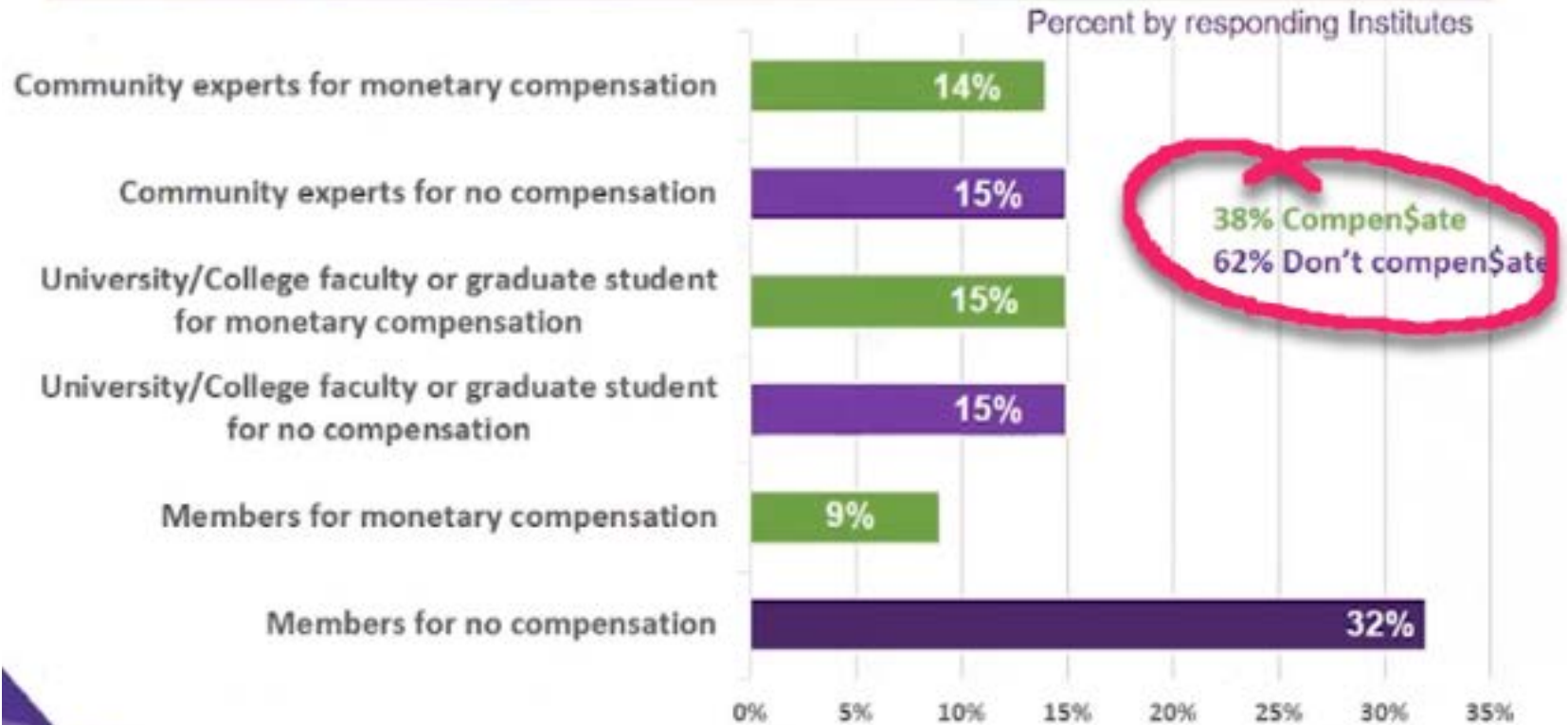
The Range of OLLIs



The Range of OLLIs

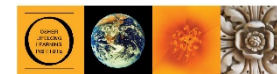


Monetary Compensation for Courses/Classes



2019 Webinar

Osher NRC



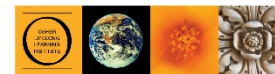
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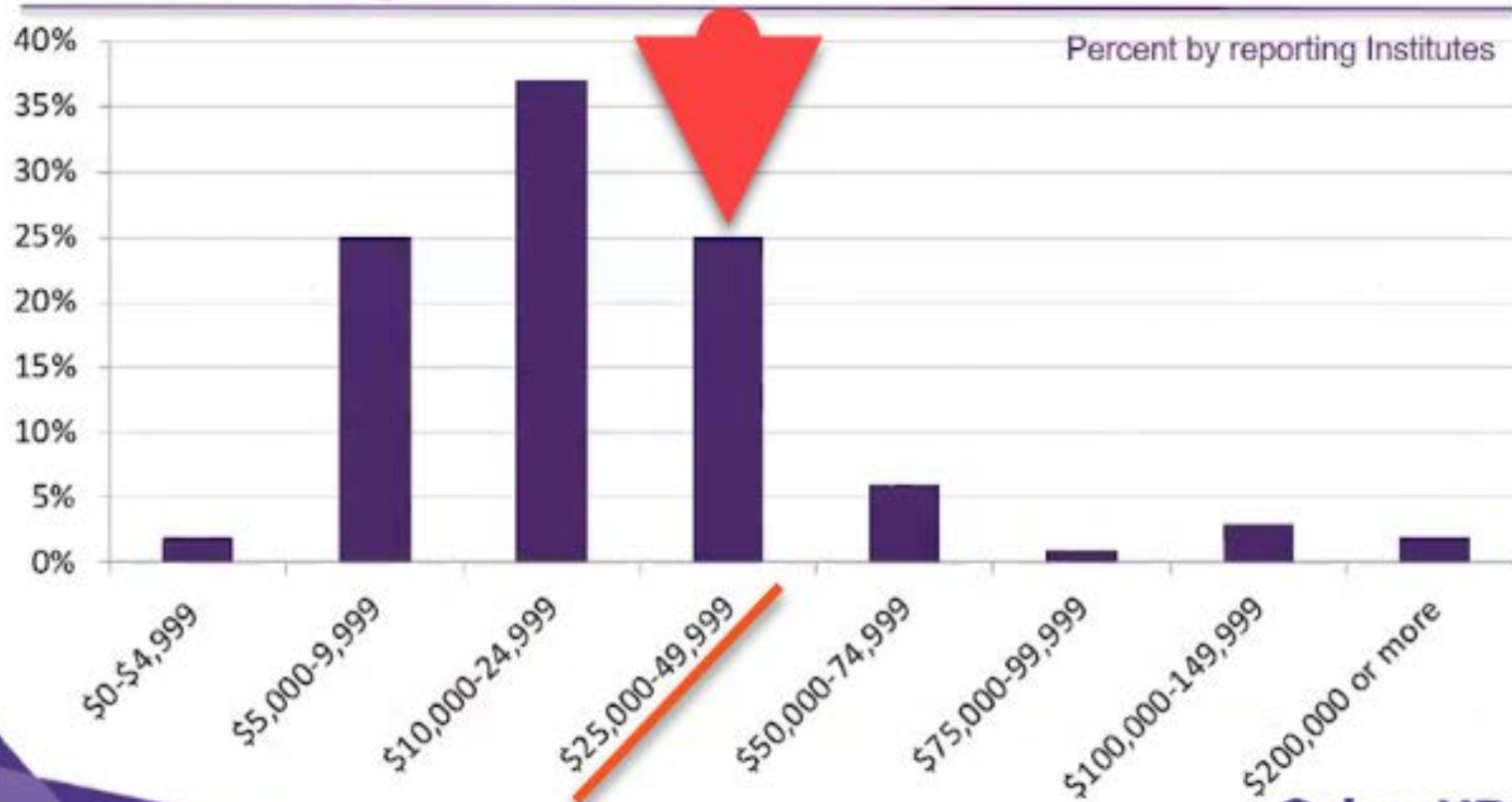
2018-19 Operating Budget Trend: BALANCE

	FY 2018-19 BUDGET	FY 2018-19 FORECAST
TOTAL REVENUE	\$ 368,005	\$ 334,430
TOTAL EXPENSES	\$ 362,455	\$ 336,301
RESERVE EXPENSE	\$ 10,000	\$ 10,000
OPERATING BALANCE	\$ (4,450)	\$ (11,871)

DONATIONS	\$ 25,000	\$ 35,000
CURRENT YEAR RESERVE	\$ 10,000	\$ 10,000
2017-18 RESERVE	\$ 17,479	\$ 19,091
TRANSFER TO OPERATIONS	\$ (4,450)	\$ (11,871)
ENDING BALANCE	\$ 48,029	\$ 52,220

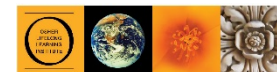


Fundraising: Funds Generated



2019 Webinar
Benchmarking

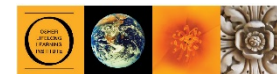
Osher NRC
National Resource Center for



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OLLI 2018-19 FORECAST vs 2019-20 BUDGET

	FY 2018-19 FORECAST	FY 2019-20 BUDGET
EARNED REVENUE	\$ 212,070	\$ 217,640
CONTRIBUTED REVENUE	\$ 122,360	\$ 125,000
TOTAL REVENUE	\$ 334,430	\$ 342,640
TOTAL EXPENSES	\$ 346,301	\$ 372,495
TRANSFER FROM RESERVES	\$ 11,871	\$ 29,855
DONATIONS	\$ 35,000	\$ 30,000
CURRENT YEAR RESERVE	\$ 10,000	\$ 26,000
PRIOR YEAR RESERVE	\$ 19,091	\$ 52,220
TRANSFER TO OPERATIONS	\$ (11,871)	\$ (29,885)
ENDING BALANCE	\$ 52,220	\$ 78,335



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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

2018-19 Priorities Summary

Goal 1: Increase dues-paying memberships

Goal 2: Conduct Space Capacity Analysis (SCA)

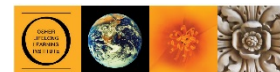
Goal 3: Add Five New Classes in Vital Areas of Interest

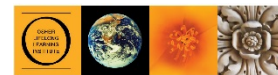
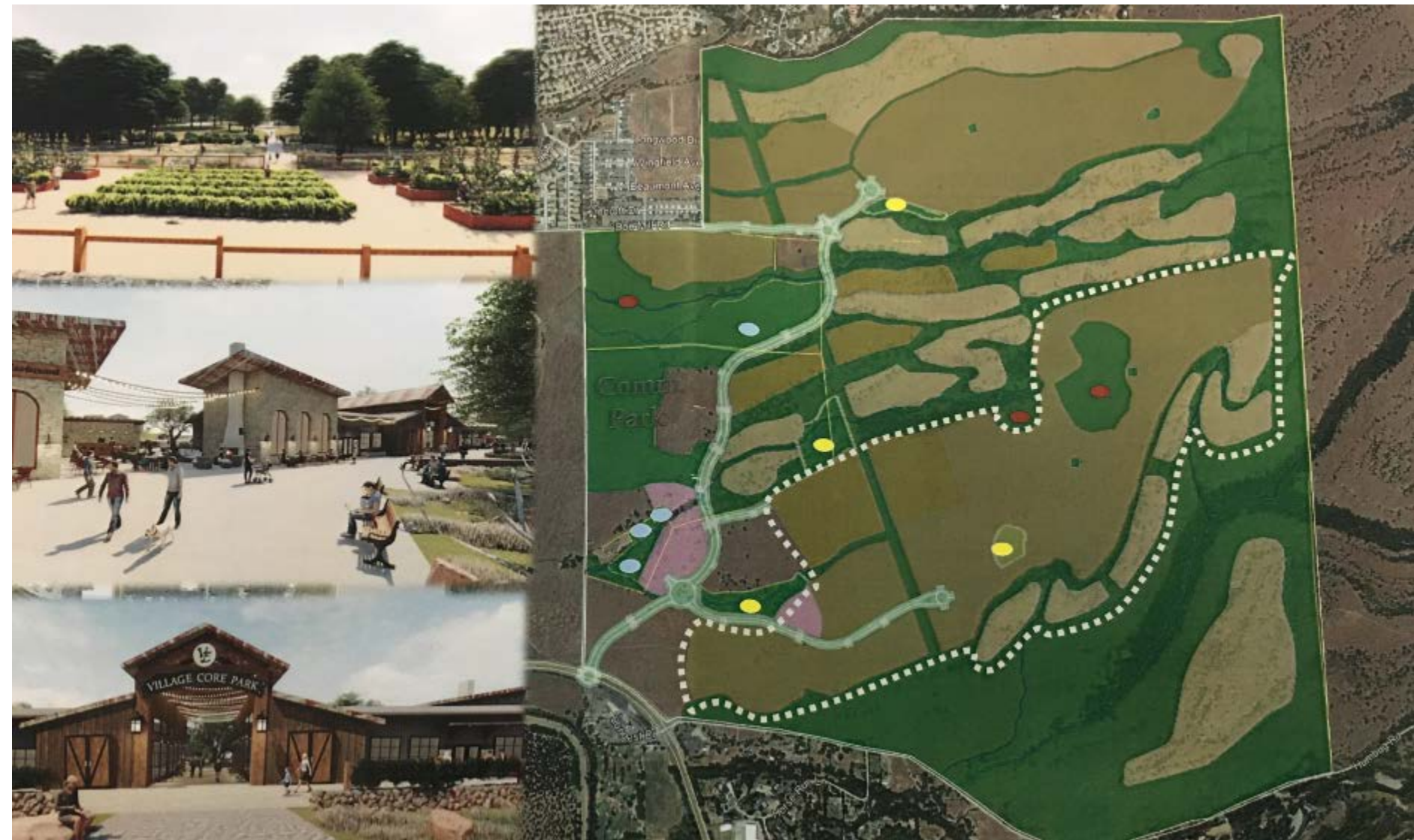
Goal 4: Establish an Innovations Team for program enrichment

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

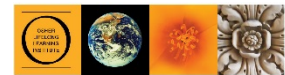




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Valley's Edge Presentation

OLLI Faculty Lecture Series Class

Monday, April 22

1—2:30pm

Bradley 2

Keynote Speaker: Seema Sehrawat

Guest: Bill Brouhard



CARD

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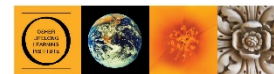
Fun Over 50 Fitness

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 »](#)



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2018-19 Priorities Summary

Goal 1: Increase dues-paying memberships

Goal 2: Conduct Space Capacity Analysis (SCA)

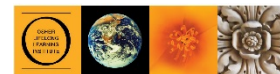
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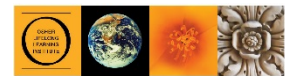
Goal 5: Improve Member Support & Social Engagement Options

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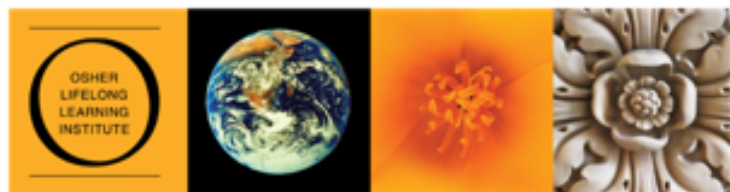


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2019-20 ANNUAL PLAN

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

2019-20 Suggested Priorities

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

