

OLLI at UNC Asheville Strategic Plan, 2012-2017

Our mission

The North Carolina Center for Creative Retirement (NCCCR) was founded in 1988 with a mission to provide opportunities to thrive in life's second half through learning, leadership, service, and research. Center participants help develop and implement programs and policies through the Center Steering Council in collaboration with the program's professional staff. The program is supported by a combination of participant fees, public funding, consulting services, gifts, and foundation grants.

In 2011, the Center received a \$100,000 grant from the Bernard Osher Foundation and in 2012 will receive \$2 million in endowments. With the receipt of endowment funding, the program became the Osher Lifelong Learning Institute (OLLI) at UNC Asheville.

The Planning Process

NCCCR had generated long range visions at several points in its history, including a 2003 document that asked "As the arenas of aging, lifelong learning, and retirement continue to change . . . [how] from our little corner of North Carolina, should we respond?" As the organization prepared to occupy the Reuter Center for the first time, leadership looked into the future rather than simply basking in their achievement. Volunteer leadership led a retreat and prompted the group to think about the changes the Baby Boomers would bring, the possibility for expanding the population served by the Center, the impact of the new facility and financial stability. They encouraged their participants to think big but also to plan realistically. In many ways their vision of 2012 is one that the organization has realized. Planning for a long-term future helped the organization set priorities and goals that helped NCCCR grow.

In 2009, the Center worked with a group of campus representatives on a Blue Ribbon Committee to plan opportunities for strategic alignment with the UNC Asheville campus. Committees of the Center Steering Council, the volunteer leadership and operations committee of the program, developed annual plans. OLLI for two years maintained a committee to follow through on these initiatives. With a new director who took an active role in making connections on campus, some of the needs and potential plans for the Alignment Committee have shifted. The past chair of the Center Steering Council now maintains oversight for campus alignment, working with the OLLI director.

In 2011, NCCCR's planning committee began to design a new planning process to manage many kinds of change at OLLI. A new director had been hired in June 2010. The program had applied for membership in the 116 member Osher Lifelong Learning Institute Network. There was a sense that the planning process up to this point had suffered from the classic problem of being shelved and seldom consulted. The annual planning process often bogged down in discussions of defining goals and objectives on an annual basis rather than moving forward to develop and carry out projects. The planning committee set out to create a long-range strategic planning process that would involve a broad cross section of NCCCR membership, that would focus on

strategic opportunities for alignment with the university, and that would be implemented in a systematic way.

The planning began the process with three listening sessions. An email newsletter and class announcements invited all NCCCR members to participate. About 40 members of the Center attended these sessions. Members of the Planning Committee facilitated and recorded the sessions. Members of the Planning Committee also interviewed the staff and 10 campus stakeholders, including the Chancellor, the Vice Chancellor for Finance and Campus Operations, the staff of the NC Center for Health and Wellness, the director for the Student Recreation Center, and others. The hope was to consult a broad cross section of those who have a stake in the success of OLLI and also to pique their interest in the plan to increase a sense of accountability for its success.

After collecting interviews and data from three years of Annual Member Surveys and other surveys collected at the Center in a "Planning Database," the Planning Committee centered on a number of initiatives and also had discussions about core values. A draft document was generated by a subcommittee and began to circulate in January of 2012 to the Executive Committee, the Center Steering Council, and the membership of OLLI. In March 2012, the Center Steering Council approved the plan that is attached. The plan identifies a series of initiatives and the key stakeholders who will work to implement these plans by setting priorities on an annual basis.

At present, the Planning Committee is working to create a system that will allow each group of stakeholders to report on a quarterly basis their progress on the plan, to track progress on all initiatives over the course of time, and to coordinate work on strategic initiatives with the work of annual planning. We expect to have that system in place by January 2013.

Key initiatives

The key theme of the 2012-2017 OLLI Strategic Plan is balance. Although OLLI had a mission to provide opportunities to thrive in life's second half through learning, leadership, service, and research, we have clearly held our focus on learning and the College for Seniors. The strategic plan calls for a focus on ways to promote our civic engagement, life transitions, and research programs and to envision new ways to carry them out, at the same time that we want to continue to support and find new directions for the College for Seniors as our largest program.

We also sought to maintain a focus on a member-driven and member-led organization and on the financial stability of the organization. We sought to address systematically ongoing concerns like pricing, registration, and new venues and methods for course delivery in new ways.

In general, this plan charts an ambitious and achievable course for the next five years of OLLI's growth and gives us the opportunity to continue to be innovative and responsive to the changing needs of our local and national audience. We will be able to make effective use of our endowment support to create growth and innovation in responsible ways. This is an exciting

time of growth, change, and alignment at OLLI. It is particularly important to set our course and to monitor progress in ways that make the most of the incredible volunteer energy and involvement that sustains our programs. It is important to remember that while our name and funding sources have changed, the community of learners and teachers and the commitment to innovation and creativity remains critical to all of our initiatives.

OLLI CORE VALUES

Sense of Community: We are a community of adults who share fellowship in an atmosphere that is respectful, stimulating, creative, fulfilling, and fun.

Lifelong Learning: We are an enthusiastic group of learners and teachers.

Innovation: We strive to be at the leading edge and model best practices nationally in learning, life transitions, and civic engagement programs for older adults.

Collaboration: We collaborate both within and outside OLLI to offer programs that benefit our members and the community.

Continuous Improvement: We seek continuous improvement in our communications, organization, inclusion, operations, programming, and facilities.

Service: We encourage our members to grow through service to OLLI, UNC Asheville, and the community.

OLLI STRATEGIC INITIATIVES 2012-2017

Initiative A—Committee operations. Maintain and enhance the operation of Center Steering Council's committees, to make OLLI's volunteer leadership more engaged and fulfilled in its functioning.

1. Update the Center Steering Council's Operating Procedures to make sure that there are clear procedures for electing officers and carrying out the work of various committees (Key Stakeholder: CSC Executive Committee).
2. Assess the current state of OLLI's volunteer leadership and address issues of organizational effectiveness, to make sure that members of OLLI's leadership manage conflict and find satisfaction in their work (Key Stakeholders: CSC Executive Committee and Nominating Committee).
3. Create appropriate training and materials to make sure that experienced and new board members and staff have a shared and consistent understanding of their varied roles in the operations of OLLI (Key Stakeholders: CSC Executive Committee and Nominating Committee).
4. Create and maintain an annual planning process that maximizes the potential of volunteer leadership to carry out the work of their committees (Key Stakeholder: Planning Committee).
5. Inform and involve all committee leadership in the financial planning and sustainability of OLLI (Key Stakeholder: Finance Committee).

Initiative B—Registration and pricing. Assess the registration process and course pricing of OLLI in order to increase member satisfaction and engagement, create staff efficiencies, and broaden the appeal of OLLI's programming to serve the needs of a wider audience.

1. Work with university IT specialists and a task force of OLLI members to assess options for online registration, with the objective of eliminating the need to stand in line for course sign-up. If online registration is an option, design and implement a procedure to introduce the new system to our members (Key Stakeholder: Ad Hoc Registration Committee).
2. Continue the work of the task force on CFS pricing, to create a way to set policies for pricing structures and to see how current pricing fits with the financial viability of OLLI's finances (Key Stakeholder: Finance Committee).

Initiative C—New venues and program delivery. Explore new venues and ways of delivering courses; assess potential partnerships to expand the profile, demographic, and service of OLLI in the broader community.

1. Work with staff at area continuing care retirement communities and other facilities that offer learning opportunities for adults, to assess their needs and resources for offering CFS style courses and lectures; create a proposal for at least one new program of course delivery (Key Stakeholder: CFS Committee).

2. Work with UNC Asheville leadership and other area providers of programming for intellectually curious older adults, to assess the feasibility of offering programming at the Kellogg Center in Hendersonville, owned by UNC Asheville (Key Stakeholders: UNC Asheville leadership, OLLI director, CFS Committees).

3. Work with IT and new media staff at UNC Asheville to explore the possibilities for developing online courses that would specifically meet the needs of older adults; create a report assessing the feasibility of offering this kind of course through the College for Seniors (Key Stakeholders: CFS committees).

4. Work with area health promotion organizations (including the YMCA, the YWCA, the NC Center for Health and Wellness, and the NC Center for Healthy Aging) to (a) catalog current offerings for older adults, (b) assess their suitability for the demographic served by OLLI, and (c) create a plan for piloting courses using new technology and new understanding of the health and wellness needs of older adults. (Key Stakeholders: Health and Wellness Committee, Wellness and Recreation Curriculum subcommittee, CFS Committee).

5. Create a plan for annually assessing the success of initiatives at OLLI to attract different demographics; create a model that will lend itself to social and financial sustainability. This should include annually tracking and reporting the success or failure of new kinds of programs (e.g., Appalachian Studies, Workshops), new times to offer courses (e.g., courses later in the afternoon, on weekends), or different pricing structures (e.g., single course pricing, higher costs to take more courses); prepare annual plans for new methods to attract new demographics (e.g., programming to attract more long-term Asheville residents, programming to attract a more racially and ethnically inclusive group of intellectually curious adults). (Key Stakeholders: CSC Executive Committee; Participants: CFS Committee, Workshops Sub-committee, Ad Hoc Pricing Committee, Civic Engagement Committee, Membership Committee, Marketing Committee).

6. Appoint a small group of people with community knowledge and connections, as well as awareness of and sensitivity to issues of diversity, to explore mission related programs that OLLI could start or support that would increase the inclusivity of our organization (Key Stakeholders: Civic Engagement Committee and staff).

Initiative D—Alignment. Enhance the connection between OLLI and UNC Asheville.

1. Publicize UNC Asheville events (e.g., lectures, concerts, and athletics) to OLLI members more consistently. Encourage appropriate UNC Asheville administrators to publicize OLLI events (Key Stakeholders: Staff through the weekly online newsletter, Marketing Committee).
2. Publish volunteer opportunities for OLLI members to help at University events (Key Stakeholders: staff working with volunteer leaders to select appropriate opportunities; Marketing Committee).
3. Work with UNC Asheville’s Human Resources office to offer retirement planning programs that meet the needs of UNC Asheville employees (Key Stakeholders: Life Transitions Committee and Health and Wellness Committee).
4. Continue and publicize our STEM lecture series and our involvement with the University’s Undergraduate Research Program; publicize these events more broadly as opportunities for our members to become involved in the lives of UNC Asheville students (Key Stakeholders: STEM program coordinator and members of the Civic Engagement Committee).
5. Contact the UNC Asheville Career Center to assess the possibility of having OLLI members serve as mentors for career counseling (Key Stakeholder: Executive Director, OLLI volunteer leadership).
6. Investigate potential opportunities for intergenerational programming between OLLI and the University (Key Stakeholder: Executive Director, CFS Committee, and Health & Wellness Committee).

Initiative E—Research. Initiate programs and activities to enhance the research component of OLLI’s mission.

1. Define the type of research that is possible and meaningful within the scope of OLLI’s resources (Key Stakeholders: Executive Committee, Research Committee).
2. Develop programming and toolkits for best practices modeled by OLLI programming, to share through the Osher Lifelong Learning Institutes’ National Network (Participants: all CSC Committees and staff).
3. Assess and report on the possibility to work with members of the Osher Lifelong Learning Institutes’ National Resource Center and with other lifelong learning institutes, to craft

questions that would catalog and assess the characteristics, attitudes, and interests of members participating in their programs (Key Stakeholder: Research Committee).

4. Contact relevant departments at UNC Asheville to assess the amount of work being carried out on issues of aging, in order to better coordinate our research work with the needs of UNC Asheville researchers, both faculty and students (Key Stakeholders: Executive Director and Research Committee).

5. Contact up to ten organizations (local, national, and regional) that study the impact of lifelong learning, aging, and other issues involved in the attempt to thrive in life's second half; craft a plan for partnerships to assess the potential of OLLI as a partner for study and analysis beyond the capacity of the volunteer members of OLLI or the faculty and students of UNC Asheville (Key Stakeholder: Research Committee).

Initiative F—Civic engagement. Initiate programs and activities to enhance the service and leadership components of OLLI's mission.

1. Study and better define the role and organization of "Civic Engagement" within OLLI (Key Stakeholders: Executive Director and ad hoc task force).

2. Enhance the ways in which Leadership Asheville Seniors provides opportunities for service and leadership and publicize the ways in which the program's graduates find meaningful service opportunities (Key Stakeholders: Civic Engagement Committee and the LAS Program Coordinator, with LAS annual leadership team).

3. Strengthen and publicize OLLI's partnership with Retired Senior Volunteer Program (RSVP), to (a) increase OLLI members' participation and (b) have a metric for the amount of service members contribute to the greater community (Patti Cameron and Civic Engagement Committee).

4. Pilot at least one program that would offer OLLI members a monthly opportunity for service and would enhance the sense of community among participants (Key Stakeholder: Civic Engagement Committee).

5. Assess the success and challenges of the Leadership Training for Older Persons program and create a plan to design a new, financially sustainable program to build on the lessons learned from this earlier effort (Key Stakeholder: Civic Engagement).

Initiative G—Economic sustainability. Explore new ways to generate revenue for OLLI in order to maintain varied and robust streams of income, thus helping to ensure the economic sustainability of OLLI.

1. Create spending principles for the Janirve and Osher endowments to make sure that they advance the mission and strategic initiatives of OLLI, while at the same time they fund programs and activities that are financially sustainable (Key Stakeholder: Finance Committee).
2. Create a model for assessing the possibility of packaging life transition programs so they could be delivered off-site (Key Stakeholders: Life Transitions Committee and Finance Committee).
3. Assess the potential for corporate relationships that would fund programming for the Creative Retirement Exploration Weekend program (Participants: Finance Committee, Life Transitions committee, staff, and members of the University's Corporate Relations group).
4. Track any trends indicating that older persons will continue to work past what is considered to be a normal retirement age (Key Stakeholders: Finance Committee and Research Committee).