

**Osher Lifelong Learning Institute  
at  
California State University Long Beach**

**2014 Strategic Plan**

**History**

Senior University at California State University Long Beach first offered classes in October 1996. Then as now, the goal was to provide an environment for older adults to fulfill the desire to never stop learning. Fifty students enrolled that first session. Within one year, Senior University had 450 members.

In 2004, in recognition of generous support provided by the Bernard Osher Foundation, Senior University became the Osher Lifelong Learning Institute at CSULB. Because of demonstrated success, the Foundation established what is now a \$2 million endowment to provide permanent support for our program.

We offer eight week class sessions each quarter of the year. 80% of our courses meet on the University campus. For the 2012/2013 academic year, we had over 100 volunteer instructors, offering an average of 60 courses per session. We ended the year with 1,465 members, an all time high.

**Mission**

To provide educational opportunities, encourage an active lifestyle and promote social opportunities for older adults. We celebrate the positive aspects of aging through a community that fosters personal growth, promotes individual empowerment and nurtures human potential through lifelong learning.

**Background**

In 2011, OLLI at CSULB adopted a strategic plan that focused on achieving certain objectives. The objectives and subsequent actions:

- *Become financially secure* – an ad hoc Development committee was formed and a goal set for raising \$150,000 in contributions over a three year period. This goal was exceeded by nearly 30%.
- *Grow our membership by 5% per year* – our membership growth averaged 10% over the past 3 years.
- *Strengthen our volunteer team* – 55 new volunteer instructors have taught courses during the past 3 years.
- *Broaden our curriculum offerings* – our course offerings have grown by 5% and 10%, respectively, during the past 2 years. Growth areas include activity classes, film, history, literature, performing arts, personal finance and science/technology.

- *Increase our presence at off-campus locations* – we increased course offerings at our off-campus locations, Leisure World and Pine Avenue, and added one course per session at the Alpert Jewish Community Center.
- *Establish partnerships with compatible organizations* – in progress.

## **Strategic Initiatives**

Our OLLI has achieved great success over the past 18 years. The potential exists to do even more. Our goal is to serve our area's growing senior population and improve the member experience. In the following sections we identify five priorities, enumerate tasks for addressing each, and identify the committee or organization with primary responsibility.

At least twice each year priorities and tasks will be monitored and updated as needed by the Executive Committee. Beginning in 2015, OLLI leadership will present a progress report at the annual membership meeting. This initial plan and the annual progress reports will also be published in the SUN and on the OLLI website.

### **1) Member Communications**

- Develop an annual social program to recruit and welcome new members (Membership Committee).
- Provide a minimum of two activity events per year, e.g., day trips, socials, theater outings (Social and Special Events Committee).
- Establish a mass email delivery plan to keep members up to date about OLLI programs, news and events. Supplement this communications with frequently updated social networking (e.g., Facebook, Twitter, Instagram) accounts (Publications and Community Relations Committees).
- Review and update our governance structure with the goals of increasing active committee membership and providing a critical mass of key people to lead OLLI into the future (Executive and Governance Committees).
- Promote volunteerism among the membership. Beyond volunteer participation within OLLI, encourage our members to take on volunteer roles within the University and in the community at large (Volunteer Committee).

### **2) Classroom space and convenience**

To accommodate our membership and course offerings growth, we will need to expand our classroom capacity, as well as parking and transportation options. One viable option is to offer more classes off-campus. This option is not sufficient, however. One of the core values of OLLI is that it is a university-centered institute. The interaction between our membership and the campus at large is one of our key features.

- Offer weekend and night classes on-campus (Curriculum and Computer Committees).

- Offer special programs between sessions (Curriculum and Computer Committees).
- Identify and secure access to campus facilities suitable for particular needs classes, e.g., arts and crafts, film, performing arts (Executive Director/Executive Committee).
- Identify, secure and publicize additional parking options. These could include remote parking locations and/or campus lot 14 coupled with shuttle service (Executive Director/Executive Committee).
- Educate members about public transportation options, including help with route planning (Membership and Curriculum Committees).
- Stagger the academic calendar to avoid our quarterly sessions beginning on the same day as the first day of University semesters (Executive Committee).
- Market Pine Avenue classes as an alternative to the campus. Especially target downtown apartment and condominium associations, as well as downtown community groups that serve seniors (Pine Avenue satellite).
- Enter into partnerships with community organizations to offer classes at remote facilities (Executive Director/Executive Committee).

### **3) Technology Modernization**

- Offer online registration and additional payment options – debit and credit cards (Executive Director/Executive Committee).
- Acquire and employ a modern data management system to facilitate class roster, member communications, parking and donation management (Executive Director/Executive Committee).
- Acquire the necessary equipment and expertise to record selected lectures, so as to provide our courses to a wider audience and better market our offerings (Instructional Technology Committee).
- Expand OLLI's web presence to include more current news and events, as well as social networking, registration and donation links. Further, digitize the archives, governance materials, instructional resources, past SUN issues and all other publications so as to make our history accessible via the web (Publications Committee and Archivist).
- Expand wireless capabilities to provide member connectivity and to offer mobile technology classes outside of the computer lab (Computer Committee).
- Develop instructional materials and courses to help our instructors stay up-to-date with current presentation technology (Curriculum and Computer Committees).

### **4) University Collaboration**

- Establish an OLLI-funded University scholarship in a field related to the study of aging (Executive Committee).

- Increase visibility with the Alumni Association. This could include articles and advertisements in *The Beach Connection* and/or *Beach Magazine*, presentations to alumni groups and joint projects with the Alumni Association (Membership Committee).
- Establish an ongoing relationship with the Emeritus & Retired Faculty Association, leading to opportunities for special programs and increasing the instructor pool (Executive Director/Membership Committee).
- Facilitate the cooperation of OLLI members as guest speakers for University classes and as subjects/participants in academic research projects (Executive Director/Executive Committee).
- Develop a mentor program to connect University students with retired professionals from the OLLI community. OLLI mentors could help students with questions about their career path, resume suggestions, interview techniques and professional networking as well as share work experiences that would be helpful to a young person starting out (Volunteer Committee).
- Provide OLLI members with a no- or low-cost option to audit University courses (Executive Director/Executive Committee).

## 5) Targeted Fundraising

Low membership and class fees, coupled with an active scholarship program, help us to serve the entire community. In order to keep fees low, expand offerings, and improve the quality of the educational and social experience, we will continue to encourage gifts to OLLI at CSULB. These gifts provide both economic strength and donor satisfaction by providing an ongoing investment in a program which has brought so much enjoyment and personal growth.

- Identify major OLLI projects around which to target fundraising appeals (Executive Committee).
- Continue to solicit donations specifically directed toward replenishment of the fund which provides membership and class fee scholarships to those whose means are limited, furthering the tradition of our OLLI being open to all who love to learn (Development Committee).
- Conduct an annual appeal to encourage significant legacy giving from our members. These would target endowments gifts, donations of stock or real estate, bequests, charitable gift annuities, charitable trusts, life insurance and memorial gifts (Development Committee).