

2007

Three Year Operating Guidelines

OSHER LIFELONG LEARNING INSTITUTE at GEORGE MASON UNIVERSITY

- PURPOSE:** Provide a Plan for the growth of the Osher Lifelong Learning Institute (OLLI) for the period 2007 through 2009 in affiliation with George Mason University (GMU.)
- SCOPE:** Provide educational, social and special events opportunities for the retired community in Northern Virginia, including Loudoun County.
- ASSUMPTIONS:** An Executive Director (ED) will remain with OLLI through the period.
OLLI will grow at 3% per year through 2009 from 762 to 833 by the end of 2009 at Tallwood and Reston combined.
In addition, Loudoun County campus will be successful and grow from 50 full members initially in 2007 to 150 by the end of 2009. OLLI will remain at the Tallwood campus at least through 2009. GMU will continue to provide maintenance and support.
The GMU/OLLI Affiliation Agreement will be renegotiated in 2007 at substantially the same terms and conditions.
- OBJECTIVES:** Provide maximal opportunities for the Northern Virginia retired community, including the new location at the GMU Loudoun County Campus, at a reasonable cost.
Develop a Facilities Plan, which includes off site class space, to accommodate the assumed growth.
Develop a Strategic Plan for Board approval for the period beyond 2010.
Approve, develop, test and implement the proposed Registration System for the Fall term 2007.
Implement Board self-evaluation driven by the Executive Committee by the end of 2007.
- OVERVIEW:** A group of concerned citizens made significant efforts, beginning in 1984, to provide educational opportunities for older adults. The Learning in Retirement Institute (LRI) was finally established in January 1991 when by-laws were approved and a board of directors and officers were elected. The first classes were held in spring, 1991. From that point forward, four semesters of classes have been offered each school year. LRI changed its name to OLLI following a series of grants made by the Bernard Osher Foundation.

The elected Board of Directors and its Officers are responsible for the overall direction and establishment of policy/governance of the Institute. Committees are appointed to provide the plans and directives for the various functional areas. The employed Executive Director, reporting to the President and the Board, provides the day-to-day management and implementation of committee plans and directives as approved by the board. An office staff comprised of five part-time employees and member volunteers performs the administrative tasks under the direction of the ED.

PROGRAM DESCRIPTION:

OLLI at George Mason University is an organization that provides older adults with opportunities for continued learning in intellectual, cultural, academic, and personal interest areas through study groups, seminars, lectures, and other activities.

OLLI is a volunteer run 501 (c)(3) not for profit organization in which members may serve on the elected board of directors and appointed committees, teach classes, lead study groups, help with the record keeping, and perform other needed tasks.

The common interest of all members is the joy of learning. The annual fee enables a member to take an unlimited number of classes and special events from a variety of over 240 choices presented during four terms. There are no tests, grades or required research papers. Lively exchanges in the classroom ensure the success of the learning experience.

Socializing among members is encouraged through informal activities, open houses, social events, and coffee periods before and after class.

FACILITIES:

OLLI at GMU currently utilizes facilities on the George Mason University campus at Tallwood, as well as offsite locations at Washington Plaza Baptist Church in Reston, Christ Lutheran Church in Fairfax, and the Church of the Good Shepherd in Burke. An additional location on the GMU Loudoun County campus is planned to start classes in the spring of 2007.

The Tallwood campus contains the administration offices, a social room, and three classrooms (two housed in modular buildings). Each classroom contains communications equipment to support PC presentations, viewgraphs, and sound equipment.

The Reston facility has two classrooms. Some special functions are held at other locations in Reston.

University plans indicate that OLLI will continue to enjoy the Tallwood site for a minimum of three more years. The University plans to move OLLI to another location, probably into classroom and administrative space in the University Based Retirement Community (UBRC) that is currently planned to open in 2010. Therefore, for the foreseeable future, OLLI's main home will be Tallwood, the offsite rental facilities and the Loudoun County facility.

POPULATION:

The membership of 762 is comprised of retired or partially retired persons primarily residing in Fairfax County and attending one or all of the above campuses. In the spring of 2007, classes will commence at the GMU Loudoun County campus in Sterling, Va.

Using the fall semester, usually the semester with the highest enrollment, as the metric, enrollments have grown to 762 through early 2007. This has been approximately three (3%) percent per year for the past five (5) years.

PARKING:

There are 75 designated spaces at Tallwood leased from the adjacent swimming pool and approximately 20 more on the periphery of the pool lot. In addition, there are 26 spaces in front of the classrooms. In general, at any given period, class registrations greatly exceed that number, some being as high as 400. Not all those registered attend every class, not every member arrives in one vehicle and many members attend more than one class daily, so there is no direct correlation between these numbers. However, they indicate that OLLI has insufficient parking. At present, members are able to find sufficient additional parking in the neighborhood, but some parking requires crossing Roberts Road, a busy road that is visually obstructed because of a steep hill approaching the entrance.

Although the Reston site is adjacent to a large public parking lot, at prime times, parking also can be difficult.

The new Loudoun County campus has sufficient parking in both front and back of the facility.

Handicap parking: At some times the current handicap parking spaces at Tallwood are insufficient. Two paved handicap spaces

near TA-3 were requested from GMU, but regulatory requirements precluded their construction.

GOALS/IMPLEMENTATION:

Opportunities for the future: The key opportunities to be pursued for future growth and quality improvement of the organization are (1) Intellectual (2) Social and (3) Recreation. All of these opportunities should be considered when programs are developed and new strategic directions are evaluated.

BOARD: Continue to provide overall direction and establish policy/governance to OLLI.

EXECUTIVE DIRECTOR: Implements the Job Description provided by the Board; provides day to day operational management of OLLI; and implements the policies and directions of the various committees.

STAFF: The current staff makes an enormous contribution to OLLI's success. Therefore, OLLI should strive to retain the current staff and improve their situation through volunteer assistance, training and additional staff when required.

PROGRAM: Program is clearly the centerpiece of OLLI. The program is dependent on volunteer teachers, including many from George Mason University. OLLI should:

Continue to attract excellent instructors and express OLLI's appreciation through the annual instructor luncheon; coffee vouchers; institute parking vouchers and develop a pick-up/drop-off plan for GMU on-site instructors to help avoid their losing parking places.

Continue and strive to improve the variety of high-quality classes for the members, and

Continue to strive to improve evaluation of programs for member interest and instructor competence.

FINANCE: The Treasurer, the Finance Committee and the Executive Director develop, analyze and propose the annual budget to the Board for review and approval. The goal is to propose a balanced budget. The Executive Director is responsible for the implementation, management and reporting on the operational budget.

PUBLICITY: Whereas most new members say that they heard of OLLI from friends, some do find out about it through newspaper articles and other publicity. OLLI should continue to seek opportunities to inform the community about its existence and worth. Investigate placing notices on Channel 18.

UNIVERSITY RELATIONS: OLLI currently enjoys a very cordial and beneficial relationship with George Mason University. It is essential that it maintain this relationship by supporting GMU in many ways, such as lobbying and participation in academics when requested. OLLI currently meets annually with the President's office of GMU, and should continue to do that to exchange information as well as to build personal relationships. OLLI should continue to hold the annual Teacher and Staff appreciation party at GMU. OLLI has membership on the UBRC development committee and should maintain this membership and exert every effort to support OLLI's requirements relative to the UBRC.

DEVELOPMENT: OLLI has a number of needs that can only be fulfilled by developing expanded facilities at the current location or finding alternative physical locations. Long-term needs include furnishing and equipping new classrooms when such are provided. In addition, funds are needed to for the excess over the budget for the Registration System. Also, funds will be required for moving and re-fielding the telephone, IT and Audio-Visual systems currently in use.

YEAR-TO-YEAR OPERATION: The Executive Director has responsibility to the Board to provide management and directions for the staff. He also is responsible to provide support to the various committees. The ED also has a responsibility to provide recommendations on approaches to expanding the capabilities to deliver the best services to our members. The Board and the ED should continue to evaluate the schedules and methodologies developed by trial and error over the years, experimenting with new ideas, when such arise, to determine viability.

SATELLITE CAMPUSES: The Board and the Planning Committee, as a part of the Vision, need to evaluate this and other approaches to the future growth of OLLI. This will most probably be a significant scenario in the Strategic Plan.

Approved by the OLLI-Mason Board of Directors, April 27, 2007