

# Three Year Plan 2023-2026



**OLLI at UNL Advisory Council**

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# OLLI at UNL

## Three Year Plan 2023-2026

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# OLLI at UNL

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### Introduction

The Osher Lifelong Learning Institute at the University of Nebraska-Lincoln (OLLI at UNL) is an adult learning membership program specifically designed for men and women 50 years old and older. OLLI at UNL is one of 125 Osher Lifelong Learning Institutes across the United States and is the only one located in the state of Nebraska. OLLI at UNL partners with and is supported by the College of Education and Human Sciences to provide stimulating and varied learning opportunities.

OLLI at UNL began in 1992 at the University of Nebraska-Lincoln as SAGE (Sharing Across Generations for Enrichment). It was housed under the Division of Continuing Studies. By 2001, membership had dropped to under 100 individuals. UNL budget reductions caused the Division of Continuing Studies to be eliminated. In 2003, the SAGE Board of Directors received a request from the Bernard Osher Foundation to submit a proposal to become an Osher Lifelong Learning Institute. The proposal was accepted and in 2004 SAGE became OLLI and was awarded a \$100,000 grant to begin operations as such. That grant was renewed for five years, and in that time, OLLI began to grow as an organization.

By 2007, OLLI had reached a membership in Lincoln of nearly 700 members. The Osher Foundation granted OLLI at UNL a \$1 million endowment. Earnings and dividends were to be used to create a support staff, find office space, and identify dedicated classroom space.

OLLI at UNL continued to flourish and by 2013, membership exceeded 1,000 individuals. The Osher Foundation granted OLLI at UNL another \$1 million endowment in 2014 to assist with the growth needs.

Over the next six years, OLLI at UNL continued to grow. Membership surpassed 1,700 in 2018. Over 250 courses were being offered each year over five terms. Course enrollments neared the 10,000 mark. OLLI at UNL began to experiment with how to reach out to those still not served. Piloting an online delivery system known as Zoom, OLLI began marketing to senior living centers to provide programming to members with limited mobility.

That piloting came to a halt in 2020 when the Coronavirus pandemic exploded across the state, country, and world. OLLI membership dropped to 1,200, but within six weeks, OLLI at UNL completely pivoted in its delivery method and began “Zooming” classes. While other OLLI’s across the country shut down, OLLI at UNL continued to thrive and deliver quality programming.

During the pandemic, members reached out to family and friends across the state and across the country to tell them the value that OLLI could provide to those quarantined at home. OLLI gained members across the country, from New York to Hawaii. It now has members in 21 states and in 73 communities across the state of Nebraska.

In post-pandemic times, OLLI at UNL continues to be one of the strongest OLLIs in the country. OLLI has returned to offering courses in-person but continues to use “Zoom” to serve those members who are challenged by the distance of their home to the in-person courses offered in Lincoln.

The organization has visions of finding ways to serve an even greater constituency of the aging population. To this end, this plan is designed to move OLLI at UNL in this direction over the next three years.

## **Mission**

The mission of OLLI at UNL is to promote lifelong learning by providing stimulating, congenial, and varied opportunities designed specifically for lifelong learners, primarily those 50 years of age and older.

## **Vision**

OLLI at UNL will be a vital, diverse, member-driven program for adult learners.

## **Value Statements**

OLLI at UNL values the following:

1. Excellence in all aspects of OLLI.
2. Innovation, creativity, and curiosity to develop and maintain a vibrant, diverse, and member-driven program.
3. Respect for diverse people, ideas, voices, and perspectives so that all members feel valued.
4. Collaboration among members to positively impact OLLI.
5. Collaboration with people in the community to support the mission and vision of OLLI.

# SWOT ANALYSIS

OLLI at UNL – SWOT Documentation from Advisory Council – December 2022

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS	THEME
Members with a wide range of interests and expertise.	Lincoln lacks awareness of OLLI/limited brand recognition and awareness.	Expansion into Retirement Centers	Pandemic – hangover/repeat	Expansion
Active participation from membership in all aspects of classes, travel, events, interest groups.	Limited social media exposure.	Connect with OLLI's in other states	Instability of membership #'s	
Reputation.	Need for increased social marketing – facebook, others	Expansion into Omaha, I-80 corridor, outstate (large population bases)	Overextending into Omaha in person	
Member-driven. Focused.		Promotion through churches	Neighboring Lifelong Learning orgs (SCC, UNO, etc)	
Members have free time to fill with OLLI opportunities.		Use technology to reach across state & with alumni. Leveraging multi-format courses to expand OLLI's reach.	Other options for seniors outside of OLLI, including online webinars, and free offerings through other orgs	
Strong word of mouth advertising.		Word of Mouth promos. Help members understand it's our best advertisement.	Turnover at UNL possibly leading to less support for the program.	
Good value. Courses/memberships are relatively inexpensive for good quality, engaging info, and experiences.		Find ways to make people not yet retired more aware of OLLI and its offerings.		

Good socialization opportunities.	Ineffective recruitment of younger new members.	Personalized direct mailings to current and lapsed members.	A polarized organization that gets liberal or conservative driving members away.	<b>Member Retention</b>
Loyal membership base.	Members “aging out.”	How do we reach out to new/younger members?	Unease with remote learning technology &/or zoom fatigue.	
Great course selections.	Little diversity in membership.	Must scrutinize what works best in senior living centers to keep them.	Competition with other ways retirees are invited to spend their time.	
No academic expectations, just joy of learning.	Large number of non-renewing members yearly.	Potential for online and offline members to connect		
Good value. Courses/memberships are relatively inexpensive for good quality, engaging info, and experiences.		Expand awareness by leveraging social media more effectively – i.e. FACEBOOK		
Campus CE – significant tech improvement – easy to use				
Financially sound	Limited Budget	Funding from Grants/Estates/Legacy/MRD donations/etc	Decline in endowment income due to prolonged decline in value of investments.	<b>Financial Sustainability</b>
Business association with UNL		Funding from donors, OLLI, Alumni, Emeriti, and current members	Decline in membership and course fees due to decreased membership	
Continued financial support from membership		Sponsorships	Investments in Omaha, outstate, NE and care facilities does not materialize in offsetting revenue.	

Well-organized & Dedicated Staff	Understaffed office	Engage/Recognize volunteers for what they bring to the organization.	Vulnerability of staff turnover	<b>Operations</b>
Great director/staff – continually looking at data & informing council	Critical and ongoing jobs typically undertaken by a limited core/few			
Access to UNL faculty (academic association with UNL)	Don't know a lot about non-members misconceptions.			
Excellent core group of dedicated volunteers, including instructors.	Difficulty connecting with non-members to invite them to join.			
Large Pool of willing volunteers.				
Good support and connection from UNL, including Dean and CEHS				
Solid offerings with variety of topics and interests	Limited curriculum	Further diversify curriculum		<b>Curriculum</b>
Great course selections		Consider location of in-person classes based on current demographic makeup of membership.		
Variety of methods/formats of offerings		Expand interest group offerings.		
Meets multiple needs (travel, events, courses, interest groups, etc)				
Ability for members to personalize selections				
Centralized location	Need more/better equipment at current and additional classroom locations.			<b>Facilities</b>
Good facilities.				

## **SWOT Analysis**

OLLI is a complex organization. A review of its strengths, weaknesses, opportunities, and threats exposes several areas key to creating a thriving environment which supports OLLI's growth. Emergent themes include expansion, member retention, financial sustainability, operations, curriculum, and facilities.

### **Expansion**

OLLI is a member-driven organization. Participants are actively engaged in all aspects of its offerings – courses, travel, events, and interest groups. OLLI enjoys a loyal membership base and a strong reputation for providing good value to its members and quality offerings for those intellectually curious. Promoting OLLI is integral to its success. Although members' word-of-mouth advertising is strong, more social media marketing and expansion into new markets will help address a lack of awareness of the organization in a changing media world. Opportunities to attract new members exist in retirements centers, in expanding into the Omaha metropolitan area, and in seeking new retirees.

As members "age out," a focus must be on new members who are "aging in" to sustain and grow the organization. The base of people is evolving as new ways to reach members (e.g., Zoom, social media) and retirees themselves are becoming more tech savvy. OLLI can grow membership by continually making sure the offerings are relevant and by reaching out to new potential members (e.g., Omaha, I-80 corridor, alums, etc.).

### **Member Retention**

OLLI provides its membership abundant course selections at a great value, socialization opportunities, and the opportunity to learn for the "love of learning." Yet, each year, many members choose not to renew their memberships. OLLI recognizes the competition with ways that retirees choose to spend their time. OLLI must retain a higher percentage of memberships by creating more social opportunities to gather, by keeping membership and offerings affordable, continuing to offer unique learning opportunities and by making membership renewal and course registration processes easy.

### **Financial Sustainability**

OLLI is financially sound, thanks to diversified sources of funding. Future opportunities to strengthen the financial position exist in membership growth, in donor "giving," through "legacy planning," and through grant writing to meet increased expenses related to a volatile economy.

### **Operations**

A committed, well-organized staff facilitates and runs the organization with a dedicated core group of volunteers, including instructors. OLLI enjoys good support from UNL, including the Dean and College. However, an understaffed office could lead to turnover.

**Curriculum**

OLLI provides solid offerings with a variety of topics and interests to meet members' needs. Interest Groups and travel opportunities are also a part of the intellectual and social component.

**Facilities**

OLLI is situated in an excellent space on UNL's East Campus. Creating a technology plan to replace and improve technology is fundamental to being able to offer courses with good technological underpinnings and to keep OLLI in a leadership position as a lifelong learning organization.

## **GOAL #1 – MEMBERSHIP RETENTION**

**Objective #1: Retain at least 80% of previous year’s membership during each annual renewal.**

### **Strategies:**

1. Embed/show upcoming OLLI offerings (course topics, travel, events, interest groups) in the renewal information.
2. Use social media to expand awareness of the “joy of learning” through OLLI.
  - a. Encourage OLLI members to “SHARE” OLLI Facebook posts with friends/family.
3. Monitor membership renewals and provide periodic membership renewal reminders to OLLI members (direct mailings, emails, texts, etc.)
  - a. Use easy to renew process with incentives and promotions.
  - b. Conduct direct mailing reminder letters to non-renewals.
    - Postcards 3-4 weeks into Term 1.
  - c. Send personalized emails to non-renewals.
  - d. Utilize targeted social media to promote renewals (with incentives/promotions).
4. Contact people by email who do not renew membership to garner feedback regarding (a) reason for non-renewal and (b) how OLLI may improve its service to regain their membership. (Reasons for non-renewal):
  - a. OLLI course offerings turned out not to be interesting to you.
  - b. Personal circumstances (geographic, finances, health, responsibility changes, etc.)
  - c. OLLI not what you expected.
  - d. Something specific happened (specify)
5. For non-responders to email, OLLI volunteers to make phone calls with similar questions to #4.
6. Create social gathering opportunities to bring members together.
7. Establish times in July for members to come to OLLI office to renew membership and get assistance on using the online process.
8. Identify a strategy for developing a more dynamic process for gathering and assessing member information and feedback given the member retention and membership expansion. (Satisfaction Survey members a couple of times a year).
  - a. After each term, reach out to membership and tell us how we are doing.

**SUPPORTING DATA**

21-22 Membership – 1,371

996 Renew

375 New

22-23 Membership – 1,419 (goal was 1,400)

965 Renew

454 New

**23-24 Membership GOAL (80% renew)****1135 Renew****369 New**

Year	Retention Rate	New Member Rate	Total
18-19	77%	22%	99%
19-20	77%	27%	104%
20-21 (Covid)	61%	15%	76%
21-22	78%	27%	105%
22-23	68%	32%	102%
4 year avg (no Covid)	75%	27%	102.5%

## **GOAL #2 – MEMBERSHIP EXPANSION**

**Objective #1: Expand membership by adding at least 26% or more of previous year's membership during each annual renewal.**

### **Strategies:**

1. Continue to explore opportunities in the Omaha/Metro area to facilitate acquisition of OLLI members from this area.
  - a. Conduct recruiting/information events in Omaha/Metro area.
  - b. Begin creating/conducting OLLI courses in Omaha/Metro area.
  - c. Conduct social activities where members invite friends.
2. Identify retirement seminars to promote OLLI.
  - a. Seek out businesses with 100+ employees to promote to their retirees, professional groups (MD's/Attorneys/etc.)
3. Establish relations with organizations such as Nebraska Public Employees Retirement Association, Aging Partners, UNL Extension, senior living centers.
4. Delineate/Target at least two geographical areas, based on analysis of geographical data analysis within and outside Nebraska to which OLLI will plan to focus on offering its membership and online offerings (courses/events) and travel opportunities. (i.e. – Kearney area).
5. Request OLLI Advisory Council members to provide at least two OLLI informational presentations to facilitate new member acquisition.
  - a. Each council member to identify two groups (civic/church/etc.) to speak to
  - b. Consider developing a speaker "group" with talking points.
6. Utilize UNL, UNO, UNMC, and UNK alumni association listservs to promote OLLI as well as Emeriti associations.
7. Explore/strengthen marketing strategies and opportunities.
  - a. Use social media to expand awareness of the "joy of learning" through OLLI.
  - b. Encourage OLLI members to "SHARE" OLLI Facebook posts with friends/family.
  - c. Word of mouth campaign (with incentives)
  - d. Seek out/conduct media interviews (tv/radio)
  - e. Share informational materials to senior living centers, medical offices, etc.

8. Collaborate with intergenerational groups.
9. Expand the use of “promotional business cards” for members to distribute.
10. Identify incentives for new members.

**SUPPORTING DATA**

21-22 Membership – 1,371	996 Renew	375 New
22-23 Membership – 1,419 (goal was 1,400)	965 Renew	454 New
<b>23-24 Membership GOAL (26% renew)</b>	<b>1135 Renew</b>	<b>369 New</b>

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22-23	68%	32%	102%
4 year avg <b>(no Covid)</b>	75%	27%	102.5%

**Notes:**

114,000 people age 65+ live in the Omaha/Metro area

200,000 people age 60+ live in the Omaha/Metro area

Omaha has over 108,000 University of Nebraska alumni

37,000 UNL Alumni

55,000 UNO Alumni

6,600 UNK Alumni

10,000 UNMC Alumni

## **GOAL #3 – FINANCIAL STABILITY**

**Objective #1: Maintain financial solvency through membership and course fees, donations, and grants.**

### **Strategies:**

1. Conduct a biennial analysis (every two years) of membership fees and course fees to determine their sufficiency to support OLLI operations. The Budget committee will have the lead role in this analysis with the first study to be completed with the development of the 2024-2025 fiscal year budget.
2. Identify annually whether any grants will be sought to support an OLLI initiative. This activity will be led the by the Resource Development Committee.
3. Conduct budget planning and financial management that maintains up to a “six month” operating surplus. This will be completed by the Budget Committee at least quarterly.

**Objective #2: Establish protocols for “Annual Asks”/donations.**

### **Strategies:**

1. Conduct an annual OLLI Development Fund “ask” campaign that includes an “ask” request of OLLI members. To be led by the Resource Development committee and completed by early November each year.
2. Partner with the University of Nebraska Foundation on matters relating to gifts and donations. To be led by the Resource Development committee and reviewed at least annually.
  - a. Consider marketing the 10-year anniversary (‘23-‘24) of the Pillar Society Fund.
3. Identify and participate in giving campaigns such as the University of Nebraska Foundation’s annual “Glow Big Red” campaign. To be led by the Resource Development committee at least annually.
4. Identify “needs” projects for resource giving and conduct “soft ask” campaigns as necessary. To be led by the Resource Development committee.

**Objective #3: Establish protocols for planned Long-Term Giving, Grant Writing, Sponsorships, and Advertising.**

**Strategies:**

1. Cultivate long-term relationships for the ongoing support of OLLI with assistance as needed from the University of Nebraska Foundation. To be led by the Resource Development committee.
2. Create an informational packet for potential supporters about OLLI at UNL that includes context, history, impact, priorities, project needs, giving opportunities and an annual report. The packet would be for distribution in hard-copy and on-line. To be led by the Resource Development committee and reviewed at least annually.
3. Promote giving through Qualified Charitable Distributions and Legacy Gifts through personal contact as well as through OLLI Connects and other media. This activity to be led by the Resource Development committee and reviewed at least annually.

**SUPPORTING INFORMATION**

Donors need to understand and recognize the urgency of why to invest. Consider and present information through the eyes of the DONOR, not OLLI.

- **Context/History:** How did we get here? What are we known for?
- **Opportunity:** What is limiting us? What is unaccomplished? What are we facing today? What if we don't change?
- **Priorities:** What can be done? Why? What will be the future?
- **Impact:** Who will benefit? What can change? What will be the result?
- **Follow up Action:** Who else is invested? What will our future become? What can be accomplished with "\$X"?

**Sponsorships/Advertising**

What will the sponsor "receive" for donating/advertising "\$X?" (advertising/table tents/etc)  
Create a "statement of acceptance" (who will we accept from....see mission, vision, values)  
Ideas: Trivia Night, Volunteer Appreciation, Pillar Reception, Showcase event, other?

Examples/Possibilities:

Runza	8800 Firethorn Lane, Suite 300, Lincoln, NE 68520
Valentino's	2601 S. 70 <sup>th</sup> Street, Lincoln, NE 68506
Pepsi	1901 Windhoek Drive, Lincoln, NE 68512
HyVee	(84 <sup>th</sup> & Holdrege = Rob Reif, Manager)
Union Bank	

## **GOAL #4 – OPERATIONAL STABILITY**

**Objective #1: Maintain staffing levels and expertise to support and deliver the OLLI at UNL lifelong learning program.**

### **Strategies:**

1. Conduct an annual analysis of resource sufficiency. (Director/ongoing)

**Objective #2: Provide OLLI members the resources and tools to facilitate the provision of OLLI courses, events, travel opportunities and interest groups.**

### **Strategies:**

1. Provide mechanisms (evaluations, surveys, questionnaires, etc.) to solicit feedback from OLLI participants in courses, travel, events, and interest groups to determine their efficacy and value. (Appropriate committees/ongoing).
2. Create and/or review, annually, curriculum resources for planning and executing all OLLI course offerings, events, and travel to ensure efficiency of operations. (Appropriate committee/ongoing)

**Objective #3: Engage/Recognize volunteers and donors for the value they bring to OLLI.**

### **Strategies:**

1. Conduct a volunteer recognition event & donor reception periodically to recognize and thank the OLLI at UNL volunteers and supporters.
2. Provide instructors with a “gift” of appreciation for teaching a course.
3. Implement the Pillar “Tier” plan to incentivize giving and “tiered” giving.

**Objective #4: Communicate and engage with UNL administration to maintain direction and support for OLLI.**

### **Strategies:**

1. The director or designee will seek regular meetings with the Chancellor and the cabinet.
2. The director or designee will seek regular meetings with UNL chairs.
3. The director will develop a strong relationship with CEHS Dean and staff.
4. The director will develop relationships with the University of Nebraska Foundation and provide invitations to events/memberships to key individuals. (ongoing)

## **GOAL #5 – CURRICULUM VARIETY**

**Objective: Analyze curriculum offerings to determine their correlation to the vision, mission, and value statements of OLLI at UNL.**

### **Strategies:**

1. Explore multiple avenues for course ideas.
  - a. Continue taking advantage of expertise of UNL staff (current and retired) who add value to courses.
  - b. Encourage those who complete course evaluations to share ideas for new courses.
  - c. Study appropriateness of the use of DVD courses. Seek out “experts” to facilitate, provide supplemental insights, or answer questions.
2. Manage the number of courses.
  - a. Determine the “ideal/target” number of courses to offer each term.
  - b. Determine the balance of one session courses vs. multi-session courses.
  - c. Coordinate the instructor/facilitator schedules to avoid overlap of similar courses in the same time frame.
3. Encourage all facilitators to join and become regular contributors to a curriculum sub-committee.
4. Create more awareness/availability to extensive documents provided for facilitators, instructors, and hosts.
5. Identify members who may be good candidates for curriculum sub-committees and/or chairs.
6. Monitor Omaha/Metro expansion for course ideas, sub-committee members, instructors, etc.

## **GOAL #6 – FACILITY STABILITY**

**Objective:** Study facility options for course offerings and events.

### **Strategies:**

1. Collaborate with UNL Instructional Technology services and the CEHS Dean to create a plan to improve the technology equipment in GNHS 137. (completed July, 2023)
2. Identify other locations with technology and appropriate seating to provide multi-format offerings, both within Lincoln and outside of Lincoln.
  - a. Consider opportunities to provide courses at senior living facilities.
  - b. Identify locations in various quadrants of Lincoln.
  - c. Identify locations in various quadrants of the Omaha/Metro area.
3. Identify locations without parking limitations.

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