

Three Year Plan 2026-2029



OLLI at UNL Advisory Council

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OLLI at UNL

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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 124 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 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 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. Since Covid, OLLI at UNL has served members in 31 states, the District of Columbia and in 85 communities across Nebraska. OLLI is also serving independent living centers with zoom and recorded course offerings. Efforts are being made to expand further into the Omaha/Metro area as well as statewide, including the I-80 corridor and rural 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 50 years of age and older.

Vision

OLLI at UNL's vision is to provide intriguing and informative courses, travel, events and opportunities for socialization for OLLI members.

Value Statements

OLLI at UNL values the following:

1. Excellence in all aspects of OLLI
2. Innovation, creativity, and curiosity
3. Welcoming all people
4. Collaboration among members to have a positive impact on 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 – **April 2026**

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 and state college and other educational institutions	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 numbers and volunteers to help get work done	
Reputation.	Need for increased social marketing – Facebook, others	Expansion into Omaha (esp. F2F), I-80 corridor, outstate (large population bases)	Overextending into Omaha in person	
Member-driven. Focused.		Promotion through churches	Neighboring Lifelong Learning organizations (SCC, UNO, etc.)	
Members have free time to fill using OLLI opportunities.		Use technology to reach across state & with alumni. Leveraging multi-format courses to expand OLLI's reach.	Competition and other options for seniors outside of OLLI, including online webinars, and free offerings through other orgs	
Strong word of mouth advertising.		Word of Mouth promotions. 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 positive 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.	Member Retention
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.	Financial Sustainability
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 & care facilities do not materialize in offsetting revenue.	
			Financial position at the University (cuts)	

Well-organized & Dedicated Staff	Understaffed office	Engage/Recognize volunteers for what they bring to the organization.	Vulnerability of staff turnover	Operations
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	Lack of volunteers for creating courses and serving on teams	Further diversify curriculum		Curriculum
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 in Lincoln	Need more/better equipment at additional classroom locations outside of Lincoln	Identify additional locations that provide in-person with onsite tech support for zoom		Facilities
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. Send personalized emails to non-renewals.
 - c. Utilize targeted social media to promote renewals (with incentives/promotions).
4. Contact people by email who do not renew membership to garner feedback regarding reason for non-renewal and how OLLI may improve its service to regain their membership. (Reasons for non-renewal): **(additional staffing needed)**
 - a. OLLI course offerings turned out not to be interesting to you.
 - b. Personal circumstances (geography, finances, health, etc.)
 - c. OLLI not what you expected.
 - d. Something specific happened (specify)
5. Create social gathering opportunities to bring members together.

6. SUPPORTING DATA

22-23 Membership – 1,419 (goal was 1,400)	965 Renew	454 New
23-24 Membership GOAL (80% renew)	1135 Renew	369 New
23-24 Membership – 1571 (82% renew)	1159 Renew	412 New
24-25 Membership – 1738 (69% renew)	1200 Renew	538 New
25-26 Membership – 1727 (as of 5-31-2026)	1284 Renew	443 New

Year	Retention Rate	New Member Rate	Total
22-23	68%	32%	102%
23-24	82%	26%	111%
24-25	69%	31%	111%
25-26 as of 6-17-26	74%	26%	99%

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.) (Use Advisory Council Members) Put together a 3-minute video and provide it to companies as they see fit.
3. Establish relations with organizations such as Nebraska Public Employees Retirement Association, Aging Partners, UNL Extension, senior living centers, Retirees/Emeriti Association, etc.
4. Delineate/Target geographical areas, based on analysis of geographical data analysis within and outside Nebraska to which OLLI plans to focus on offering its membership and online offerings (courses/events) and travel opportunities. (i.e. – Kearney area).
5. OLLI Director/Staff to give presentations as identified by members and/or requests by organizations to promote OLLI.
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, i.e. “Bring A Buddy”)
 - d. Seek out/conduct media interviews (tv/radio)
 - e. Share informational materials with senior living centers, medical offices, etc.
 - f. Identify incentives for new members.
8. Expand the use of “promotional business cards” for members to distribute.

SUPPORTING DATA

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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 2027-2028 fiscal year budget.
2. Identify annually whether any grants will be sought to support an OLLI initiative. This activity will be led by the Resource Development Committee.
3. Conduct budget planning and financial management that maintains up to a “six months” 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.
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/sponsors 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 forms. 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 is 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:

Horisun Hospice

Eastmont Senior Living

Changing Spaces SRS

Bridge to Better Living

Other operations that directly serve a senior population.

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 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. Continue 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 their designee will seek regular meetings with the Senior Vice-Chancellor of Academic Affairs and Chancellor and the Chancellor’s cabinet.
2. The director or their designee will periodically communicate and/or meet with UNL chairs.
3. The director will develop a strong relationship with CEHS Dean and faculty 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.
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 overlapping of similar courses in the same time frame.
3. Encourage all facilitators to join and become regular contributors to a curriculum team.
4. Continue to create more awareness/availability to extensive documents provided for facilitators, instructors, and hosts.
5. Identify members who may be good candidates for curriculum teams and/or chairs.
6. Monitor Omaha/Metro and Greater Nebraska 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. Specifically, improvement of sound (microphones) needs to be addressed.
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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