Yours in Learning: Administering an OLLI Program

Presenters:
Michelle Riggio, Interim Assistant Director, Continuing Education, and Jon C. Neidy, Interim Executive Director, Smith Career Center Bradley University, Peoria, IL

Osher Lifelong Learning Institutes Conference 2014
Yours in Learning: Administering an OLLI Program

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Dedication and Acknowledgment
This workshop is based on and adapted from the work of two of Jon’s former colleagues from summer sessions administration. Ron Wasserstein, Executive Director, American Statistical Association who authored: *What Every President and Every Chief Academic Officer Should Know About College and University Summer Session* and Cordelia Maloney, Executive Director, School of Continuing Studies at the University of Illinois at Chicago who constructed: *Summer Session Program Self-Profile*. We are grateful to them for their work and believe they would be thrilled to know we have adapted it for an emerging field in higher education.

In addition, we would like to thank all of our Continuing Education colleagues at Bradley University who make our OLLI a fantastic learning community.

We would also like to thank The Bernard Osher Foundation and The OLLI National Resource Center for believing in us and providing us with the opportunity to share our experiences.

Finally, we would like to thank the members of the Bradley University Osher Lifelong Learning Institute from whom we have learned much and plan to learn more.
Workshop Description
The New OLLI Administrators’ Workshop provides a valuable opportunity for new or almost new OLLI Program Administrators to share experiences and learn together. The purpose of the workshop is to provide you with an overview of OLLI program administration and the basic skills for success. The workshop is planned to let you reflect and organize your thoughts and help answer some of the questions you may have about OLLI program operations. Four key areas of OLLI administration will be examined: organization, curriculum and program planning, finance, and marketing. As a new administrator, you come to OLLI with different experiences and different perspectives. This highly interactive workshop will provide you with an opportunity to reflect on what you already know about your university, administration, faculty, and programs, and merge your knowledge with new information.

Workshop Outline
- Introductions
- Your Colleagues
- Questions, Expectations, and Goals
- Resources
- Organization
- Curriculum and Program Planning
- Lunch
- Finance
- Marketing
- Evaluation

Introductions
Your Name:

Public or Private (circle one)

Report to:

Total OLLI Annual Headcount:

Length of Time in OLLI Administration (circle one):
Less than 1 year 1-2 years 3 or more years
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Your Workshop Colleagues

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Questions, Expectations, and Goals
What are your expectations for this workshop?

What goals do you have for our workshop today?

What questions do you want answered?

Our Expectations for the workshop
• Participate
• Ask questions
• Laugh and relax

Our Goals for the workshop
• Answer your questions and generate some of our own
• Prepare you to get the most out of your conference experience
• Help you to build a group of colleagues
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Resources (located online at http://www.bradley.edu/academic/continue/lifelong/olli/national-conference/)

- OLLI at Bradley University Annual Reports
  - OLLI at Bradley University Annual Report 2011
  - OLLI at Bradley University Annual Report 2012
  - OLLI at Bradley University Annual Report 2013

Organization Articles
- Lifelong Learning in Aging Societies
- With Mission in Mind - OLLIs Devise Ways to Grow Learners

Curriculum and Program Planning Articles Follow
- Civic Engagement and Lifelong Learning
- Effective Teaching for the Elderly
- Gerontagogy Beyond Words - A Reality
- Older learner's journey to an Ageless Society
- Participation in Lifelong Learning Programs by Older Learners
- Peer Learning
- The Evolution of John Mezirow's Transformative Learning Theory
- Wisdom in Lifelong Learning Institutes

Finance and Fundraising Articles
- Building Communities of Philanthropy
- Don’t Forget to Say Thank You
- Fundraising Mechanics
- The 21st Century Campus _Gerontological Perspectives
- Why Baby Boomers Choose Campus Living

Marketing Articles
- Framing New Terrain Older Adults and Higher Education
- Higher Education for Older Adults
- Lifelong Learning NCES Task Force Final Report Volume I
- Lifelong Learning NCES Task Force Final Report Volume II
- Maturing of America
- Organizing The Baby Boomer Construct
- Participation In Lifelong Learning Institutes

Please note a wonderful array of resources and ideas is available on the National Resource Center Website under the links titled: OLLI Materials Library and OLLI Research

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Organization

LLIs at Institutions of Higher Education
LLIs are now a reality at hundreds institutions of higher education throughout the country. As the population of older adults in the United States continues to increase, these programs will grow and others will emerge. The organizational placement of your LLI at your host institution can both hinder and help your program for the long term.

Models
Lifelong Learning Institutes are organized in numerous different ways, and no one model is universally agreed to be superior. Some institutions have highly staff-focused models where decisions regarding programs and budget are made by institutional staff. Others have more volunteer-focused models, with a staff member who coordinates the efforts of the volunteer decision makers and/or serves in a support role. Every point along this spectrum seems to be occupied. Campuses also have their own unique climates and cultures as well.

The common factor found among successful lifelong learning programs, however, is that someone (either staff or volunteer) ultimately has clear responsibility for the program, and has been given the authority and the budget needed to carry out this responsibility within the structural model of the institution. The acknowledgment of this responsibility is important so someone can serve as the champion for the Lifelong Learning Institute on the campus and within the local community. The experiences at many different kinds of institutions bear witness to this idea. Perhaps the main reason why this is so is that there are many competing interests involved, lifelong learners have needs and desires regarding the program and the resources it utilizes, but so do college or university students, faculty, and administration. These competing needs can often be reconciled in a very beneficial way, but this will not happen on its own and therefore someone needs to be “in charge.”

Reporting
There are many reporting models for LLI directors. Most commonly, LLI directors report to someone reporting to the Chief Academic Officer or to an administrator of continuing education (and/or extension, special instructional programs, or other names). The "right place" for a LLI director depends on the institution, of course. However, in order to be able to exercise the authority described above, the LLI director should report to a senior administrative official.

Volunteers
Engaged volunteers are a requirement for any successful model of a LLI. Their interests, abilities, and connections shape the LLI organization in myriad ways. The relationships between volunteers and staff also serve to shape the organizational structure of the LLI. Volunteers must be included when discussing the organizational structure of a LLI.

Volunteer Executive Boards
The development of an effective volunteer board and engaged committees is vital to the success and longevity of any LLI. The delicate organizational balance between volunteer and staff leadership must be attended to on a consistent basis.
Organizational Examples

<table>
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<th>OLLI</th>
<th>Brief Description from Website</th>
<th>Number of Members 2009-2010</th>
<th>List of Officers or Executive Committee</th>
<th>Term Limits?</th>
<th>Brief Description of Election Process</th>
<th>Approach to Strategic Planning</th>
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| OLLI at Vanderbilt University | Osher Lifelong Learning Institute at Vanderbilt supports lifelong learning. It is an organization that provides adults with educational programs, stimulating tours and trips, and a variety of social events. The program reflects the high academic standards espoused by the university on all levels. By offering non-credit courses, students benefit from the stimulus of lectures and discussions in an informal and relaxed environment. The student body is a cohesive group that projects a true sense of community, always welcoming new members. www.vanderbilt.edu/cngr/olli/ | 1001                         | 1. President  
2. Vice President/Pres. Elect  
3. Past President  
4. Curriculum Chair  
5. Lunch and Learn Chair  
6. Marketing Chair  
7. Membership Chair  
8. Nominating Chair  
9. Special Events Chair  
10. 4 at-large members | Yes, The President serves a 1 year term with an optional second year. The Chairs and at-large directors serve 3 years. | The Nominating Chair appoints a committee who identifies a potential Vice President/President elect from the Board of Directors. The committee also identifies potential at-large directors. This year an e-mail was sent to the current members asking for nominations (including self-nominations). They call and confirm the willingness of those nominees to serve. Those nominees are presented to the general membership for a vote. | The Board appointed a task force to create a long range plan, which we continue to implement. |
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<th>OLLI at University of South Florida</th>
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| Senior programs at the University of South Florida began in 1993 as separate liberal arts and computer courses for adult learners. In 2004 we became part of the Osher Lifelong Learning Institute. In 2008 the computer and liberal arts groups were merged into the present OLLI structure. Most of our courses are conducted by OLLI members who have demonstrated a particular skill or knowledge. In some courses we acquire new skills. In others we learn from each other as we listen to opposing views. We draw upon the expertise of the instructor and the wisdom of our classmates as we synthesize them with our own views and opinions. All courses help us to grow and expand our horizons as individuals. Day trips, social events, special interest groups and free lectures are also offered. | 1188 | 1. Chair  
2. Vice Chair  
3. Secretary  
4. Treasurer  
• Board of Advisors consists of 7 elected members plus 6 Committee Chairs  
• Executive Committee includes 4 Board Officers plus 1 Elected Board member | Yes, Board Members are elected to staggered 3 year terms. Board members may seek re-election after one year’s absence from the Board. Committee Chairs are appointed for 2 year terms and may be reappointed by the Board. | The Executive Committee appoints a five member Nominating Committee to review the applications, interview candidates, and submit a slate of candidates for Board approval. The contested election is held at the Annual Membership meeting in May of each year. Newly elected Board members take office immediately. Board officers are elected at the Board’s annual retreat in June of each year. | The Strategic & Organization Planning Committee identifies OLLI’s strengths & weaknesses & helps develop strategies to capitalize on or mitigate those. The Board Retreat is a time to review what worked & didn’t work for the year & set goals for coming year. |
## OLLI at Bradley University

The Osher Lifelong Learning Institute (OLLI) is an organization at Bradley University whose members share a common goal: to remain vital and active in their late career and post-career lives. Consisting of over 850 individuals from age 50 to 98, OLLI members come from all backgrounds and educational levels. Together they enjoy participating in a diverse collection of programs including non-credit classes, educational travel, study groups, and special events.

www.bradley.edu/continue/olli/

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<th>OLLI</th>
<th>Brief Description from Website</th>
<th>Number of Members 2009-2010</th>
<th>List of Officers or Executive Committee</th>
<th>Term Limits?</th>
<th>Brief Description of Election Process</th>
<th>Approach to Strategic Planning</th>
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| OLLI at Bradley University | The Osher Lifelong Learning Institute (OLLI) is an organization at Bradley University whose members share a common goal: to remain vital and active in their late career and post-career lives. Consisting of over 850 individuals from age 50 to 98, OLLI members come from all backgrounds and educational levels. Together they enjoy participating in a diverse collection of programs including non-credit classes, educational travel, study groups, and special events. | 864                        | 1. President  
2. Vice President  
3. Secretary  
4. Treasurer  
5. Past President  
6. Curriculum Chair  
7. Winter Chair  
8. Learning Trip Chair  
9. Study Group Chair  
10. Lectures Chair | Yes, the Past President, President, Vice President, Secretary and Treasurer may only serve 1 year terms. The Chairs may serve 3 year terms. | The Executive Committee appoints a five member nominating committee, who identify a potential Vice President, Secretary, and Treasurer from among the previous year’s volunteer list. They call and confirm the willingness of those nominees to serve. Those nominees are presented to the general membership for a vote. The Chairs are appointed by the President, Vice President, Secretary, Treasurer, and Past President | Informal and as issues emerge. |
## Yours in Learning: Administering an OLLI Program

<table>
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<tr>
<th>OLLI</th>
<th>List of Committees</th>
<th>Volunteer Opportunities</th>
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| OLLI at Vanderbilt       | 1. Executive Committee  
                          | 2. Curriculum Committee  
                          | 3. Lunch and Learn Committee  
                          | 4. Marketing Committee  
                          | 5. Membership Committee  
                          | 6. Nominating Committee  
                          | 7. Special Events Committee | Volunteer to serve as class assistant or serve on any committee. The Chairs then decide depending on the numbers needed. |
| University               |                                                         |                                                             |
| OLLI at University of    | 1. Curriculum Committee  
                          | 2. Development Committee  
                          | 3. Membership Committee  
                          | 4. Social Events Committee  
                          | 5. Strategic & Organizational Planning Committee  
                          | 6. Volunteer Committee  
                          | • The Board of Advisors also has an Executive Committee  
                          | • Several Ad-hoc Committees are formed as needed for short-term projects | 1) Committee volunteer  
                          |                                                         | 2) Faculty volunteer  
                          |                                                         | 3) OLLI Office volunteer  
                          |                                                         | 4) Special Projects volunteer  
                          |                                                         | 5) Class Assistant volunteer  
                          |                                                         | 6) Computer “Coach” volunteer  
                          |                                                         | 7) Special Interest Group volunteer |
| South Florida            |                                                         |                                                             |
| OLLI at Bradley University | 1. Executive Committee  
                           | 2. Study Group Committee  
                           | 3. Learning Trip Committee  
                           | 4. Curriculum Committee  
                           | 5. Winter Classes Committee  
                           | 6. Art Exhibit Committee  
                           | 7. Parking Committee  
                           | 8. Luncheon Committee  
                           | 9. Class Host Committee  
                           | 10. Membership Gift Committee | • serve on any committee  
                           |                                                         | • participate in our class session evaluation and wrap up  
                           |                                                         | • attend a mailing/labeling party  
                           |                                                         | • act as class hosts |
Questions to Guide our Conversation about Organization
If you cannot answer a question...just skip it....and go to the next one...

1. What is the explicit mission of your institution?

2. What is the explicit mission of your LLI?

3. Has your LLI resided in different places organizationally in your institution?

4. Has the scope of responsibilities/authorities/charge to your LLI changed over time?

5. What are the primary responsibilities of your office/position?

6. What % time do you devote to your LLI?

7. What role do volunteers play in the organizational structure of your LLI?

8. How would you describe the nature of the relationship between you and your volunteer Executive Board?

9. How do volunteers move into and out of leadership roles in your LLI?

10. What specific goals have been articulated for your LLI?
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11. What is the source of these goals and expectations?

12. List the staff in your office (who work with your LLI) and their responsibilities

13. What kinds of resources do the following offices represent in terms of accomplishing the work of your office?
   - Parking
   - Dining Services
   - Facilities
   - Mail Services
   - Marketing/Public Affairs
   - Survey Research (actual office or academic unit with this expertise)
   - Other
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Curriculum and Program Planning
LLI members are and must be at the heart of any Lifelong Learning Institute. If this is not the case at your institution, you may want to consider exercising your influence to bring about this perspective. Three questions, asked in this order, should drive your program planning whether it be done by committee volunteers or institutional staff:

- What courses/programs do members need or want?
- What times or instructional formats meet member’s needs?
- Who is available to teach these courses or facilitate these activities?
- What resources are required to provide them?

What courses/programs do students need or want?
While members vary from institution to institution, the research and experience of many LLI directors in a variety of settings shows that the majority of members who participate in LLIs do so for the following two “broad” reasons:
- to learn
- to socialize

Members who choose particular courses or programs do so for many different reasons: a long-time interest, to satisfy an unmet desire from his or her youth, to socialize with friends, to stay current, to communicate with family and friends, to improve job-related skills or employability, or for personal enrichment. Understanding which of these are most important to various groups of members at your institution is an important part of LLI curriculum planning. Thus, the LLI can be likened to an investment portfolio. A diversified selection of courses is required to meet these varied needs and wants.

What times, or instructional formats meet member’s needs?
Lifelong Learning Institutes by their association with academic institutions tend to discuss program formats in terms of semester or seasons. Typical academic calendars for schools on a semester system allow 15-16 weeks for fall and spring terms with shorter terms sometime occurring in the summer and winter months. Whatever the time allotted, LLIs often consists of a mixture of course or program lengths. Program lengths are also dependent on the “type” of program being offered. Many LLIs offer learning trips which tend to be one day programs, but are rich in educational experience.

Who is available to teach these courses or facilitate these activities?
With good communication and careful planning, your LLI can and should benefit members and instructors/facilitators alike. Certainly the choice of courses or activities to be offered depends on the availability of qualified people to teach them. The recruitment and retention of qualified instructors and facilitators is vital to the success of any LLI program.

What resources are required to provide them?
Resources’ ranging from parking to pencils and classrooms to copiers is certainly one of the issues that all Lifelong Learning Institutes consistently address. Although we will be discussing this more in the next section, I think it is important to note here, that all good program planning includes a discussion of necessary resources.
Questions to Guide our Conversation about Curriculum and Program Planning

If you cannot answer a question...just skip it....and go to the next one

Please note that when I use the word “curriculum”, I mean all the educational endeavors which your LLI offers to its members. For example, a lecture series, learning trips, cinema events, etc.

1. Who determines the LLI curriculum?

2. What is process for determining LLI curriculum?

3. What criteria are used for selecting specific courses or activities?

4. Who determines your curriculum? (individual instructor/committee/committee chair/institutional staff)

5. If curriculum is set by committee, does your office (do you) participate in the process through which it is set? How?

6. Who else reviews/approves the LLI curriculum?

7. What type/degree of influence do you have in determining the LLI curriculum?

8. How many terms do you currently have?
   a. What length are they?
   b. Is there a specific goal or purpose to one or more of the terms?

9. Who are your instructors and facilitators? (Institutional faculty, LLI members, local experts?)
10. Who recruits and retains instructors and facilitators?

11. What criteria are used for selecting instructors and facilitators?

12. How are instructors and facilitators rewarded for their efforts?

13. Describe your relationships with the volunteers with regard to determining LLI curriculum.

14. What special programs are part of your LLI (special interest groups, travel, civic engagement, outdoor activities, etc.)

15. Who has responsibility for determining and allocating campus resources?

16. How would you describe your campus’ reaction to the use of those resources?
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OLLI Luncheon Work
Please take a few minutes to write down some questions or comments you may have for your luncheon companions about our experience thus far this morning.

Please make sure and ask someone, not attending the workshop these two questions:

What have been your members’ responses to fundraising efforts?

What is the single best marketing or advertising idea you have implemented?
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Finance
Fiscal Obligations
Typically, the LLI director is charged with a specific fiscal obligation that must be met through membership and registration fees. That obligation might be to cover:

- direct program costs;
- direct program costs and salaries; or
- direct program costs, salaries, and a “revenue” expectation.

Instructional Salaries
At some institutions, particularly research-oriented colleges and universities, enticing faculty to teach at all is difficult to do. Some institutions, however, find that the opportunity to supplement salaries makes LLI teaching an attractive option for faculty. The attractiveness of the option will depend on the rate of pay and related compensation issues, however, and there is great variety among institutions in this regard.

Institutional Benefits
LLIs should benefit the institution. Perhaps the most fundamental thing you should think about as a director of an LLI is how the LLI is important to the university as a whole. If you cannot identify what your program “brings” to the institution than you are not communicating that in your daily interactions with other institutional stakeholders.

The benefits of LLIs to students and faculty were discussed earlier, but consider also the following: Most LLIs cover their direct costs and provide a strong connection for the university to both alumni and friends of the university. LLI members tend to feel passionately about their experiences and therefore form deep connections to the program. Those connections to the LLI can be used to meet other institutional needs such as development, volunteer, scholarship, and mentorship opportunities. Other fiscal benefits can accrue to conference facilities, parking, the bookstore, food service, etc. Buildings and grounds do not sit empty, but can be used more efficiently.

Development Opportunities
One of the primary reasons many institutions sponsor or offer a LLI is because of the long-term development opportunities that can be realized through a coordinated membership development effort. All institutions of higher education, either public or private, are going to become more dependent on the donations of alumni and friends of the institution in years to come. Development, fundraising, or “friendraising” is one of the principles of higher education with which you should become familiar.
Calendar of Fundraising Activities for FY14-15

The OLLI Executive Committee set the following goals for FY 15, to be achieved through the combined efforts of the Executive and Fundraising Committees, OLLI staff, OLLI volunteers and members, and the Bradley University Advancement Division.

1) To raise $28,000 – this amount takes into consideration the generous support that OLLI members are giving in support of the victims of the November 2013 tornado which affected more than 1,000 homes in the OLLI geographic area.

2) To increase the number of donors by 5% – the purpose of this goal is to build awareness among OLLI members of the need to support their organization, and we will use the 20th anniversary of OLLI at Bradley University as a means to ask all OLLI members to give a birthday gift to OLLI.

3) To work with Bradley University’s Advancement Division to educate OLLI members about planned giving opportunities.

4) To organize a fundraising event with the long-term goal of developing a signature event that OLLI members will support annually.

<table>
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<tr>
<th>Month-Period</th>
<th>Year</th>
<th>Activities</th>
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| March-May    | 2014 | - Begin plans for a summer or fall 2014 fundraising event. Ideas include a trivia contest, a presentation by Illinois wine growers with a dinner and wine tasting, or a reception with a high profile speaker.  
- BU Advancement Division hosts second program on planned giving. |
| June-August  | 2014 | - Develop activities for the fall annual giving initiative, including using OLLI’s 20th birthday as a theme, i.e. “Your Birthday Gift to OLLI.”  
- Purchase a second multi-passenger shuttle bus.  
- Develop a tagline for use at OLLI lectures and cinema events, i.e. “Brought to you by donations from OLLI members.” |
| September-November | 2014 | - Evaluate the cost and effectiveness of email communication vs. printed and mailed letters.  
- $28,000 goal announced at Kickoff Luncheon.  
- Fall fundraising begins, in alignment with the OLLI Fall Kickoff.  
- BU Advancement Division hosts third program on planned giving. |
| December     | 2014 | - Holiday thank you and giving reminders mailed. |
- Evaluate the FY 15 fundraising plans and develop FY 16 fundraising plans.  
- Announce FY 15 fundraising results at OLLI Spring Kickoff. |
| March-May    | 2015 | - BU Advancement Division hosts fourth program on planned giving.  
- 2015 “connections” survey results announced. |
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Questions to Guide our Conversation about Finance

1. Circle the funding structure of your LLI – what are your fiscal obligations?
   - direct program costs;
   - direct program costs and salaries; or
   - direct program costs, salaries, and a “revenue” expectation.

2. Is your LLI partially or totally self-supporting? Describe.

3. What are the membership fees and activity costs for your LLI?

4. Do you provide scholarships for lower-income members? Describe.

5. How are revenues (if there are any) generated from your LLI managed?

6. Do you pay your instructors, if so, how is the salary determined?
   - Fixed schedule based on rank?
   - Adjustable amount based on enrollments?
   - Percentage of academic year salary?
   - Other?
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7. Do you pay facilitators for other activities or just for “structured” courses?

8. How does your LLI benefit your host institution?

9. How do your members “engage” with other offices or departments on campus?

10. What do your members say about your LLI when they “run into” other institutional administrators?

11. Do you have a structured giving program for your LLI? If so, how did you implement it and how well is it doing?

12. Do you have access to the levels of giving that your current members provide to the institution as whole? If not, how could you make that happen?
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Marketing
It is important to remember that, for all LLI members, the LLI is one option among many available to them in the community. Therefore, it is important to put strategic effort into marketing. Your own members must be sold on the benefits of giving up some of their precious free time to participate in your programming. Many of us do not have a marketing background or do not see marketing as our strengths therefore, we struggle with our marketing efforts. The important thing to know about LLIs is that your own members are your best possible marketing tool.

General Concepts
1. Define Your Audience - Know your demographics. Are they primarily your own alumni, local community members, retired faculty and staff, retired professionals, or the general public who just enjoy learning?
2. Gather Data - Talk to and survey members, instructors, facilitators, institutional alumni, and your institutional colleagues.
3. Plan Your Strategy - How will you reach your market? Where can you find potential members who are most likely to attend? How do you appeal to your market? Is your access to program materials and registration easy? What benefits will potential members find in the program? Can you develop new programs or courses? Do you have interesting and fun courses to target to your current members?
4. Tactics - Budget, staff resources, partnerships across campus, member support, focus groups. Buy lunch or coffee for members and get their input.
5. Public Relations - Outreach: advertising (print ads, radio); Design (Web, print): resources for formal and informal print jobs; Printing (posters, flyers): size of pieces, mailing; Open Houses for potential members (send flyers and handout schedules), reply mailer for speaking engagements; Web (helpful for baby boomers especially); Vendors and Community Connections: Local civic organizations, mailing houses, local agencies on aging, AARP, etc.
6. Evaluate Your Responses - Code your return mailings to keep track of your response rate. Ask members where they heard about your program. Conduct member surveys (ask former members why they didn't come). Also conduct demographic information surveys. Develop a marketing and publications timeline. Know your statistical information, e.g., course enrollment histories.

Developing a Marketing/Advertising Plan: In 2 Easy Phases and 7 Easy Steps
(adapted from: Cordelia Maloney, University of Illinois at Chicago)

Please (don’t complete this…just read through it)

Phase 1: Analysis
In the analysis phase, you determine what the expected outcomes are for your LLI, what you’ve got to offer, and to whom.

Step 1: Establish/Clarify Goals and Objectives for your LLI:
What are the institutional goals and expectations for your LLI?

- Maintain status quo? (If so, what is the status quo?)
- Increase enrollments and or revenue production? Overall? Or in targeted populations? By how much?
- Contribute in other specific ways to campus mission? Such as...

Write a summary statement of the objectives of your LLI:

Step 2: Define Your “Product”:
What defines your LLI?

- Curriculum: Does it offer a full array of courses? Does it feature special programs?
- Who: Who participates in your program now?
- Why: Why do members participate in your program? What do they gain?
- Cost: Is it “competitive” with other alternatives?
- Instructors and Facilitators: Are they high-profile? Do they have “followings”?
- Location: What distinguishes your location? Is it a selling point?
- Schedule: Does your scheduling offer greater access?
- Campus Mission: What is your campus mission as it relates to your LLI?
- Other

Write a summary statement of your product:
Step 3: Define Your Audience:
Who are your target audiences? To whom are you advertising? What action do you want them to take?

- Current retirees?
- Emerging retirees?
- Part-time retirees?
- Children of potential members?
- Agencies that work with retirees?
- Civic or social organizations?
- Faculty, staff of your own institution?
- Human Resource Departments of community businesses?

Name and prioritize your target audiences and the specific actions you want them to take:

Step 4: Do Market Research:
Who is the competition?

- How is your LLI alike or different from other opportunities in the community?
- How do they advertise/market their programs?

Write a summary statement of your market position versus your competitions:
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What does your target audience want from you? How do they perceive their need for your “product”?

There are a number of ways you can gather this information, including:

- surveys
- focus groups
- casual interviewing
- If your office is the customer service point for members and potential members, be sure to capture the information about who’s calling and what they want.

Write a summary statement of how your target audience views their need for a LLI:

Phase 2: Execution
In the execution phase, you determine how and where you will communicate your message to your target audiences.

Step 5: Develop a Message
All of the information you gathered in the analysis stage now is distilled into a message. Advertising messages are conveyed in both words and pictures that work together. Sometimes the picture predominates, sometimes the words do. The message may be represented in a logo, a tag line, body copy, or a graphic—sometimes in all of these. Regardless of how the message is communicated, it needs to be clear and consistent: repetitions of a well thought-out clearly articulated message accumulate to create awareness. Always refer to the analysis you’ve done to make sure your advertising message is staying on target.

- Get creative
  After doing the analysis of your situation you really are prepared to develop tag lines, copy, slogans—even graphics, if you have design talent. However, if you don’t feel up to writing, conceptualizing, and designing your own advertising pieces, you’ll need to locate some help. Many schools have very active and effective marketing departments. Other options include outside ad agencies and creative services. Some LLI’s have good luck enlisting help from retired advertising/design members. However, if you work with members, remember they are not objective. Allow extra time and stay closely involved with the project. In any case, your job is to make sure the advertising—in terms of both words and graphics—represents your best understanding of your product, audience and market.

- Refine and adapt the message
  Anywhere the message appears, it should be consistent. However, it will need to be adapted to suit different placements (As an illustration of how this works, pick two items from the “Advertising Placements” list and imagine how the same message would play out in each.)
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It’s good to be thinking about message and placement at the same time as each informs the other to some extent.

Step 6: Place Your Message
Once you’ve developed your message, all that’s left is to determine where to place it. Budget will determine a lot of the specifics of where you place your message. Your primary concern will be to get your message out to your target audience(s) as frequently and as efficiently as you can. In order to have an effective marketing strategy, you’ll need to prioritize your audiences and then decide where you can best reach them. The “Advertising Placements” list will give you some ideas. While choosing your media placement, remember a few things:

- **Critical mass**: Someone somewhere once said that if you can get a consumer to consider your message three times in a short time span, you’ve done the most you can to make a sale.
- **Think “outside the lines”**: The goal here is not to spend a lot of money; it’s to get your message in front of your target audience(s) as frequently and with as much impact as possible. Some of the most effective placement of your message can be inexpensive or even free.
- **Companies that can help**: there are a number of companies that can help you place media
- **Don’t overlook the importance of advertising to faculty, staff and administration**: They can be critical to your effort in a number of ways and, if your message is sound and well-executed, they can become your best promoters.

Step 7: Track and Assess:
Build tracking into your marketing plan. You need to know what is working. One caveat, however: awareness is built gradually. Sometimes you have to give things more than one try to see if they will produce results. This is especially true if you’re starting a new program or reinvigorating an old one.

(Adapted from: Cordelia Maloney, University of Illinois at Chicago)
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Current Marketing Efforts for OLLI at Bradley University

PRINT
Direct mail for four seasonal brochures
- Current mailing list
- Purchased mailing list (as needed)

Newspapers
- Occasional articles NO paid advertising (Thanks Don Wagner!)

Magazines
- Healthy Cells Magazine
  - Advertisement
  - 5 articles related to OLLI

Cultural Event Programs
- Bradley University Theatre
- Corn Stock Theatre
- Eastlight Theatre
- Heartland Festival Orchestra
- Peoria Ballet
- Peoria Civic Center Broadway Series
- Peoria Players
- Peoria Symphony Orchestra

Billboard
- War Memorial and University – donated by Bill Hardin

RADIO
- WCBU
  - Underwriters – dates coordinate with OLLI Registration dates 4 times per year

TELEVISION
None – investigated underwriting on WTVP – cost prohibitive

TRADE FAIRS
None – done in the past and we have not found “our market” there

PRESENTATIONS
- Rotary (Riggio)
- Lions (Members)
- Kiwanis (Lange)
- Genealogy Club (Neidy)
- Delta Kappa Gamma (Shepherd and Haupt)
- Couples Group at First Federated (Neidy)
- Retired Teachers Organization (Riggio)

OTHER
- Informal partnership with Methodist Encore!
- Collaboration with World Affairs Council
- Collaboration with Historical Society
- Collaboration with Peoria Fine Arts Society
- Increased number of Study Group locations in an effort to attract different members geographically
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Questions to Guide our Conversation about Marketing
1. Identify your LLI audiences (please circle or check)
   - Institutional alumni
   - Friends of the institution
   - Pre-retirees
   - Recent retirees
   - Current members
   - Retired faculty or staff of the institution
   - Current faculty or staff of the institution
   - Other retiree organization members
   - Seasonal residents (“snow birds”)

2. How do you currently market your LLI?

3. What other institutions in your area offer programming to older adults?

4. Is there a separate fund for marketing of your LLI?

5. What are the campus requirements or expectations with regard to marketing?

6. What are the campus resources with regard to marketing?

7. What are your offices responsibilities for customer service?

8. Do your members interact with other offices on campus?
9. What is their level of awareness / state of preparedness for responding to LLI-specific information needs?
Yours in Learning: Administering an OLLI Program

10. How are new members welcomed to the LLI?

11. How do new members register? How do they pay?

12. How many courses or activities were offered in your last academic year?

(adapted from: Summer Session Program Self-Profile, by Cordelia Maloney, University of Illinois at Chicago, available in its entirety as a resource in the binder)
Reflection and Action

Please take a few moments to read back through your notes and reflect on our conversations. Next, write three action items you are going to address in May 2014.

1. 

2. 

3. 

We know if you write them down you are more likely to do them.

THANK YOU!