

# ***STAKEHOLDER'S MANUAL***



**OSHER LIFELONG LEARNING  
INSTITUTE**

**AT**

**CALIFORNIA STATE  
UNIVERSITY  
CHANNEL ISLANDS**

***Congratulations!*** Your decision to join the Osher Lifelong Learning Institute (OLLI) at California State University Channel Islands (CSUCI) was a wise investment in the future of your educational and intellectual growth. You have bought into a product with great value for low cost. With proper care and treatment, your membership should give you years of intellectual enhancement, or “learning for the sake of learning”. This *Stakeholders Manual* is intended to acquaint you with how OLLI operates so that you can maximize return on your investment.. It represents the state of the Institute at the time of publication (summer, 2009); from time to time, as policies and practices change, amendments will be made available. Choice of the description “Stakeholders” is deliberate since OLLI’s success depends on the support, volunteerism, and understanding of members. So read the rest, and enjoy your OLLI experience!

## **Background, Or What We Are About**

The Bernard Osher Foundation, headquartered in San Francisco, was established in 1977 to benefit a wide range of educational, cultural, and other nonprofits. In 2001 the Foundation began a series of grants to establish lifelong learning centers for mature learners at colleges and universities. Beginning with existing “Learning in Retirement” programs in 2001, the program expanded to include universities with no prior existing program for mature adults. In 2003, when there were 18 Universities in the OLLI system, CSUCI was invited to submit a proposal for an Osher Lifelong Learning Institute. A proposal was submitted by Gary Berg, PhD, Dean of Extended Education, and Barbara Thorpe, Ed.D, Assistant Vice-President for Sponsored Programs and accepted effective April 1, 2004. It was among the first 30 Institutes in the OLLI family, and one of the first to start without having had an existing program for mature learners (in large part because CSUCI was itself new!). There are now about 120 OLLIs spread among the 50 states!

OLLI-CSUCI was begun in April 2004 with Martin Kaplan, Ph.D. as founding Director. The first classes, a set of eight classes offered Monday through Thursdays for eight weeks, began in the fall of 2004, an unusually quick start-up time for a completely new OLLI. Over the years, as membership grew, OLLI outgrew it’s room on campus, and as its reputation spread, classes were extended to Ojai, Ventura, Oxnard, Camarillo, Thousand Oaks, and Simi Valley. Moreover, the number of classes kept pace with membership growth, so that in the 2008-09 academic year 49 classes were held in six locations compared to 28 at one location in the first year.

The nature of Osher Foundation support is that in the first three to four years of a program’s life, the budget is supplemented by a yearly grant of \$100,000. At the end of this probationary period each OLLI is scrutinized for program quality, financial sustainability, and membership growth. Only those surpassing all criteria are awarded an Endowment of \$1,000,000. From this the OLLI can use up to \$50,000 of the annual earnings for its budget, obtaining the rest through member fees, donations, and grants. OLLI-CSUCI was awarded the Endowment in May, 2008, joining a small but distinguished list of Universities.

## **The OLLI-CSUCI Philosophy**

As is true of all Institutes in the OLLI family, your OLLI is dedicated to providing intellectual stimulation to persons over 50. The Foundation’s purpose is to serve senior learners who no

longer need college credits or degrees, and who will have nothing of tests and grades! It is learning for the sake of learning, not “will this be on the test?”

The Foundation permits wide latitude in *how* the learning proceeds. About half the OLLIs have classes taught by fellow members – actually they are less “classes” than discussion groups. These tend to be Institutes that existed prior to becoming OLLIs, which retained their member-led format. Other OLLI’s have courses taught by paid experts, often University faculty or retirees. These OLLIs are often those started where previous lifelong learning programs did not exist, such as CSUCI. Your OLLI is in the latter group, and we have chosen the academic class format with instructors who are engaged to provide the highest quality of instruction. Another distinction between OLLIs is that some offer a variety of formats and content – short courses (five weeks or less), single lectures, and self-improvement and skills training in addition to academic subjects. Our belief is that short courses and non-academic topics are readily available via Community Colleges and therefore our mission as a University-related Institute is to provide the best in academic courses. Furthermore, longer courses promote in-depth treatment of academic topics, avoiding the superficiality of one-time lectures.

This does not mean that experiences, both learning and social, are ignored by our quality-driven course philosophy. Member opportunities additional to our menu of regular courses will be described in the section: **Partnerships and Benefits..**

### **Becoming a Member: Three Options**

Classes are open only to members, but attaining membership is easy; just enroll in classes! There are three levels of membership. By enrolling, you have selected one, but you may change to another in a subsequent OLLI session. A **Full Year** membership permits enrollment in all three OLLI course sessions each year (Fall, Winter, and Spring) at a savings over three **Single Session** memberships. The latter permits unlimited enrollment only in the session in which membership is current. The third level is **Single Course** membership, in which the member may enroll in one course that session. To enroll in more, the member would have to upgrade to **Single Session** membership. Single course membership is designed for persons who want to test-drive OLLI by taking one course, or for those who, for any reason, wish to attend a single class close to home.

### **Locations**

OLLI services are available at several locations. The central location is at the CSUCI campus in the Richard Merkin-OLLI room in the John Spoor Broome Library. Classes are held daily for six weeks, two and one-half hours per class meeting. Off-campus courses generally run for eight weeks, meeting two hours per session. Classes are held in Ventura, Thousand Oaks, Simi Valley, Oxnard and Carpinteria.

### **How Courses Are Selected and Evaluated**

Members participate meaningfully in the process of course selection. Members may, for example, suggest courses and instructors to the staff, though if instructors can not be found for certain courses, they can not be held. The typical process of building a course schedule starts

with a potential instructor submitting a proposal to the Director of Programs (DP). The proposal may have been invited by the DP on the basis of member preferences, or spontaneously submitted by potential instructors. The proposal consists of brief descriptions of the course and instructor, and a more detailed course outline. Where the proposer is new to OLLI, a resume and references are also requested. The DP reviews the proposal and makes a preliminary judgment of quality and fit to the program, often working with the proposer to improve the course. When the course is judged acceptable to OLLI standards, it is sent to the *Curriculum Committee*, consisting of four to five OLLI members who review the courses for meeting our standards and potential interest to members. Courses not meeting those criteria and that can not be remedied by comments from the Committee and DP are discarded. Acceptable courses are then presented to the full membership enrolled that session, who indicate their interest in each class. Those classes not achieving a sufficient level of member interest are dropped, leaving us with courses that are judged to be of high quality and interest.

At the end of a course, the course and instructor are evaluated by class members on a standard survey. Instructors not receiving very good to excellent evaluations are not invited back to OLLI. The course and instructor evaluation scales have a maximum score of 5.0; typically the *average* score of OLLI instructors is over 4.5.

Courses cover the spectrum of topics in the sciences, social sciences, art and music, and humanities. To insure diversity in courses, no course is repeated at the same location within a two year period. A pool of nearly 60 instructors (at this writing) is available to serve your course needs, many of them University Faculty.

The number of courses offered in any given year depends on revenue that year. In turn, revenue depends on the number of members and the level of membership fees. *It is preferable to increase the former than the latter, so it is in your interest to recruit new members rather than face fee increases or course decreases.* Another revenue source, in addition to proceeds from the endowment and member fees, is donations from members and others in the community. Each OLLI member is a potential fund raiser, designated to locate donors for the program.

### **A special course package**

Your OLLI comes with an optional package, **Taste of OLLI**. This is a series of eight two-hour lectures in Thousand Oaks on Saturday mornings. The lectures are on an array of topics, each by a different lecturer, often an OLLI instructor, but sometimes a special guest. These lectures are intended to attract new members by having them test the product for a short and inexpensive time, that is, to give them a “taste”. Though intended for newcomers, present OLLI members are cordially invited to attend, but as with the newcomers, they pay the small added fee.

### **Partnerships and Benefits**

OLLI members do not live by courses alone. Members are especially invited to University events, such as visiting speakers; they have use of the Library, and may purchase a pass to take materials home, along with other benefits. Some benefits are in the hands of members, for

example, members are encouraged to form committees to enhance programs such as social events, a summer program of speakers from among membership, and travel.

OLLI has had many **partners** over the years that enhance the OLLI experience. They change with time, so in this manual a small number will be mentioned. First, we are able to hold our off-campus classes through the partnership of institutions in other cities, mostly Senior Centers and Libraries. Second, The CSUCI John Spoor Broome Library has partnered with us to provide the Merkin-OLLI room for campus classes. In return for use of the room during our three six-week sessions, OLLI equipped the room, raising over \$80,000 in a very short period from member and friends donations for the equipment. Third, we partner with the CSUCI Alumni and Friends Associations so that OLLI members receive a discount on membership, that is, they pay the same fee as CSUCI graduates. Membership in the A&FA entitles OLLI members to many benefits. Finally, there is our oldest and very dear partner, the New West Symphony. From our start, a member of the Symphony has been teaching classes. Members taking classical music classes are invited at a vastly discounted ticket price to a performance of the NWS, the program of which is often related to the class topic. Class members are then escorted to the “Green Room” to meet and greet performers after the concert. All members have access to discounted NWS tickets when they are also members of the Alumni association.

## Communication

In any organization communication is important for members to take full advantage of the organization. In fact, failure to be engaged in communication can have negative consequences for you and your OLLI. Over the course of a year, important information is sent to members about special programs, new courses, changes in courses, enrollment openings and closings, changes in policies, and more. Here is a list of the media through which your OLLI speaks to you about important news regarding its functioning. Ignore them, and your OLLI will not give you the full service you deserve:

- The quarterly newsletter: **The Islander**
- **Bulletins** placed on the class room board. The board should be checked at each class meeting.
- **Announcements in classes** by instructors, OLLI staff, or designated members.
- **E-mails.** It is important to have your current email address on file to write you about class cancellations, beginning of the enrollment period, and so on. The Islander is sent only by email. One of the perks of membership is that members may enroll before enrollment is opened to the general public via catalogs, but they can take advantage of advance notice only through the email announcements sent to them.
- **OLLI Web Page.** Announcements and other news (e.g., classes for the coming session) are placed on the OLLI web site ([www.csuci.edu/exed/osher.htm](http://www.csuci.edu/exed/osher.htm)). Visiting it will yield a wealth of information about your OLLI.
- Attending the **Annual Member and Information Meeting** usually held in August.
- All **queries or communications** from members regarding courses and instruction should be addressed to the Director of Programs. *All other communications* are addressed to the Director of Operations.

Your **instructor** rarely knows anything about OLLI beyond his or her own class. Unless it's a question about that particular class, don't ask.

### **Your OLLI Comes With Two Optional Speeds**

OLLI may be operated in one of two modes. Either will bring you satisfaction; the choice is yours. The **client mode** is more automatic, requiring little effort beyond paying fees and taking classes. Members choosing this mode should still attend to communications as messages important to their classes and enrollment are frequently conveyed (see preceding section on **Communication**). The client-member benefits OLLI by contributing to its member base, which in turn impacts the number and variety of courses that may be offered.

The **active member mode** is more complex. The member may choose from among many different activities. This mode offers involvement in the work and functions that benefit OLLI, reflecting a stake in OLLI's present and future. The outlay in time and effort is met with pride in the member's role in OLLI's success. The **active member** has many outlets available for his or her contributions. A short list includes:

- Recruiting by bringing new members, distributing catalogs and flyers in the community, identifying and speaking to outside organizations, and more. Recruiting new members is the engine that drives OLLI – when membership falls short, courses and other activities are curtailed.
- Serving on the Curriculum Committee that reviews course proposals and conducts the membership interest survey.
- Serving on the Member Services Committee that, with input from membership, plans extra-curricular activities such as travel, summer and social programs and speakers from within membership.
- Serving as class representatives to administer surveys and course evaluations in their classes and act as a bridge between the P.A. and the class.
- Seeking donations in the community (including donations from oneself)
- Being available to assist the Director in matters that emerge from time to time.

### **Concluding Points**

Your OLLI will provide intellectual enrichment for years to come, but requires patience, understanding, and if you choose, volunteer assistance. The number and variety of classes depends on fee and other revenues, which are best enhanced by a steady flow of new members. Enlisting new members is largely in your hands by word-of-mouth, active recruitment, and personal cajoling. OLLI could not run smoothly without the assistance of those who choose to be active members and volunteer for needed activities. In the end, the courses that are offered, and more directly, the experiences outside those courses, are in the hands of the stakeholders, that is, OLLI membership.

## Important Contacts

OLLI-CSUCI web site [www.csuci.edu/exed/osher.htm](http://www.csuci.edu/exed/osher.htm)

National OLLI Site: <http://usm.maine.edu/olli-national/> (take a look – it's informative)

Marty Kaplan, Director of Programs (Courses) [marty.kaplan@csuci.edu](mailto:marty.kaplan@csuci.edu); 437-8583

Nicholas Fuentes, Director of Operations (Operations, Member Relations, Recruitment, Marketing)

[nicholas.fuentes@csuci.edu](mailto:nicholas.fuentes@csuci.edu) 437-2698

OLLI: (questions regarding fees, enrollment, updating information, etc.) 437-2748 FAX: 437-8859

Administrative Support Assistant, 437-2748

University Police 437-8444

University Parking 437-8432

University closures, roads information 437-8444

CSUCI Library 437-8561

Alumni & Friends Association 437-8952

ADA (community rides for those with mobility problems) 983-0691

CAT (dial-a-ride in Camarillo) 988-4228

Mail: OLLI, California State Univ. Channel Islands, One University Dr., Camarillo CA 9302

OLLI office, 2109 Sage Building

