



PARTNERS IN EDUCATION WITH
WILLIAMS COLLEGE
BARD COLLEGE AT SIMON'S ROCK
MASSACHUSETTS COLLEGE OF LIBERAL ARTS

AT BERKSHIRE COMMUNITY COLLEGE

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**BILL→OLLI:
An Opportunity to Grow Even Better**

September 10-11, 2007

Retreat Summary Report

**OLLI @ BCC
Retreat Summary Report**

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To: The Executive Committee, OLLI Board of Directors;
Dean Bill Mulholland, BCC Liaison;
Barbara Hochberg, OLLI Executive Director

From: The Retreat Committee
5, 2007

Date: October

Subject: BILL→OLLI: An Opportunity to Grow Even Better
Retreat Summary Report

We are pleased to present for your information and consideration “BILL→OLLI: An Opportunity to Grow Even Better” Retreat Summary Report. It contains the contributions of 46 retreat participants and is designed to help you look at the issues raised and examined at the Retreat, identify the challenges facing us and explore mechanisms to address them that capitalize on OLLI strengths.

Creation of this report was directed by the Retreat Committee, chaired by Harriet Vines. Committee members were Howard Arkans, OLLI First Vice President; Paul Flaum, BILL Past President and Retreat break-out group facilitator; Barbara Hochberg, OLLI Executive Director; Bill Mulholland, Dean of Lifelong Learning, BCC; Stephen Radin, OLLI President; Arthur Sherman, BILL Past President and Osher Foundation Liaison; and Alexandra Warsaw; Past BCC Coordinator of Community Relations and BCC-BILL Liaison. Retreat break-out group facilitators Helene Calman, Edward Epstein, Lenore Rubin and Bill Vogt joined in reviewing this report.

Our consultant, Christine Singer, was instrumental in implementing and analyzing pre-retreat survey information, designing the retreat, training facilitators, facilitating the retreat and preparing a draft of this document. We appreciate the wisdom of all who assisted in this process and thank all the members of OLLI who participated and shared their thoughts about how to make OLLI "even better." This venture would not have been possible, and certainly not as successful, without them.

We urge you to review the report and act promptly and accordingly.

II. Mission Statement

OLLI@BCC is a membership-run educational organization designed to:

- a. Offer non-credit courses throughout Berkshire County and nearby communities; courses created and developed by and for its members on topics reflecting a variety of interests.
- b. Encourage members to serve on committees, be planners, course coordinators, facilitators and lecturers.
- c. Provide programs of special events, distinguished speaker programs, travel both within and outside of the State of Massachusetts and other activities to promote peer interaction.

In addition to the purposes and objectives ordinarily and customarily exercised by non-profit educational organizations, OLLI shall have the power to make gifts from any earned surplus to worthy recipients in accordance with the bylaws and operating procedures.

III. History of OLLI @ BCC

More than thirteen years ago, Tom and Judy Easton imagined an organization offering stimulating adult learning experiences and opportunities for social interaction. With the help of Presidents Hank Payne of Williams College and Barbara Viniar of Berkshire Community College, plans were developed and implemented.

The first meeting of a small group of Berkshire County residents was held June 16, 1994 at the Easton's home in Lenox. The result of their efforts was the formation of Berkshire Institute for Lifetime Learning (BILL).

Under the direction of its seven past presidents, Tom Easton, Len Stolzberg, Anne Dulye, Norman Avnet, Arthur Sherman, Paul Flaum and Mona Sherman, BILL grew to more than 800 members. BILL became an important educational addition to the community, gained not-for-profit status, offered more than 50 courses annually during three academic semesters, presented an extensive Special Events program with day trips to museums, theaters and historical sites and instituted a Distinguished Speaker Series.

On July 1, 2007, BILL affiliated with the Osher Lifelong Learning Institute and OLLI at BCC was formed. It is now part of the Office of Lifelong Learning at BCC.

IV. The Retreat Process

OVERVIEW

A retreat planning process generally addresses three important questions about an organization:

- What is its current position (strengths, weaknesses)?
- Where is it going (short and long term goals)?
- How will it get there (plan to achieve the goals)?

PHASES

The plan was developed in three phases.

Phase One: Pre-retreat Survey Completion and Trend Identification

Phase Two: Two-day Board & Staff Retreat

Phase Three: Preparation of summary report for the Board and members.

Phase One

Invitations to participate in the Retreat were sent to all members of the OLLI Board of Directors, the Executive Director, OLLI members who were identified as current or past active participants within OLLI, and representatives of OLLI Partners in Education. Eighty invitations were extended; 48 were accepted.

A pre-retreat survey was emailed or posted to all OLLI members who were invited. They were told their input was valuable and would be included, whether or not they attended.

The following Pre-Retreat Survey questions were posed:

- Based on your experience with BILL, please list up to three features you liked best.
- Please suggest up to three improvements you would recommend in any area/s, i.e. program, organization, procedures, policies, marketing, membership.
- How do you see yourself most effectively contributing to the success of OLLI?
- It would be most helpful if you would tell us what you would like to see come out of this retreat.
- Please tell us any idea you have that we didn't elicit, that would make OLLI great in your estimation.

The responses to the above questions were summarized and are included in Appendix A of this document, "OLLI Survey Results - Analysis of Trends."

Phase Two

A two-day retreat was held September 10/11, 2007 at the Crowne Plaza in Pittsfield, Massachusetts. It was attended by 46 individuals: Board members, committee chairs, the Executive Director and selected OLLI members.

- The Retreat Committee and the Board of Directors identified the following five agenda goals:
 - Facilitate Transition from BILL to OLLI
 - Devise a strategic plan inclusive of specific goals, objectives, strategies, performance indicators/measures, project completion dates, and responsible people incorporating Osher Foundation requirements with a goal of maximizing organizational efficiency and effectiveness and making the transition as seamless as possible.
 - Develop mechanisms to fully address all goals insuring optimal participation and communication among OLLI members, committee chairs, staff and board members.
 - Orient Executive Director to OLLI, its members and their abilities.

- Gain increased investment and commitment from OLLI members to best meet identified mission, goals and objectives.

The agenda was devised by Ms. Singer (Appendix B)

The consultant directed the Retreat. It began with an overview of the BILL/OLLI history, presented as a "timeline" by Elliott Vines; the "Benefits of Becoming OLLI at BCC" presented by Arthur Sherman; and the compiled survey trend results presented by Ms. Singer.

Five break-out groups were formed to address the issues generated by the agenda Goals noted above. The topics and facilitators were introduced by Ms. Singer. The groups, their charges and facilitators are as follows:

1. Membership: Recruit, Retain, Motivate
Facilitator: Edward Epstein
2. Academic Program: Courses, Distinguished Speakers, Seminars, Study
Groups
Facilitator: Bill Vogt
3. Educational Options: Special Events, Clubs, Activities
Facilitator: Helene Calman
4. Organization: Board, Executive Director, Committees
Facilitator: Paul Flaum
5. Marketing/Communications: Outreach
Facilitator: Lenore Rubin

Participants were assigned to morning and afternoon break-out groups and lunch tables. Before dispersing, members at each breakfast table joined in writing a song or cheer about OLLI. (Appendix C)

During the morning of the first day, each break-out group met to consider its topic for 90 minutes. After lunch, participants considered three additional topics for 30 minutes each, in "add-on" groups comprising different people each time. Facilitators guided participants throughout the day to review the current status in each area and identify barriers to success/obstacles.

On day two of the retreat, participants returned to their original committees to brainstorm possible solutions to noted problems. Their charge was to:

- Review all input received
- Organize concepts into goals
- Prioritize goals
- Determine measurable objectives for each goal
- Develop strategies, performance indicators/measures, and if they could, a projected completion date and responsible person for each objective
- Prepare easel sheets and/or worksheets to share material with all retreat participants

Phase Three

Preparation of The Retreat Summary Report

V. Implementation Plan

The following steps were agreed upon with reference to implementation of retreat outcomes.

1. The Retreat Committee will review and edit the goals, objectives and strategies developed at the Retreat and coordinated by Ms. Singer
2. The Retreat Committee will submit the report to the Executive Committee of the OLLI Board of Directors for review and appropriate action

VI. Retreat Summary

Major Goals from All Committees

Numbers in parentheses correspond to group designations indicated above

1. Increase membership by recruiting new members (Group1)
2. Decrease the percentage of members who do not renew (1)
3. Motivate current members to more actively participate in OLLI activities (1)

4. Increase number and variety of courses (2)
5. Expand calendar coverage (2)
6. Expand and deepen relationships with current and prospective education and cultural partners (2)
7. Establish affordability of trips to increase participation (3)
8. Create intergenerational events (3)
9. Share Information/Experiences with Other OLLI's (3)
10. Create an administrative structure to enable OLLI to function effectively in the future and to implement the Osher proposal (4)
11. Establish a Board of Directors' Training Program (4)
12. Increase OLLI's visibility to the general public (5)
13. Improve OLLI's internal communications (5)

GOAL 1: Increase Membership By Recruiting New Members (1)

Objective: Increase new members by 25%

Strategies:

- Recruit a younger target population
 - Offer more courses in evenings
 - Offer life experience courses (*e.g.*, investing for retirement)
 - Offer recreational outdoor activities
- Recruit people who are homebound or in an assisted living facility
 - Show courses via videotape on their central TV
 - Courses organized by the facility
 - A new category of members for assisted-living residents
- Increase membership by part-time residents
 - Later start for Spring courses and/or shorten some courses
 - Earlier start for Fall courses and/or shorten some courses
 - Summer courses; performance (recreational)-oriented

- Get more friends and other acquaintances of current members to join
 - One-page information sheet
 - Coffee meetings with member and his/her friends
 - Information sheet in catalogue mailings (I don't know what this means)

- Recruit people with a more diverse educational background
 - Introduction-type courses in art, literature, etc.
 - How-to courses, such as knitting, photography, PC's, skiing, hobbies
 - Life-planning support when retiring: investing, grandparenting, etc.

- Expand into contiguous counties (list counties in NY, CT, VT and MA)
 - Newspaper articles about OLLI and any possible members in the county
 - WAMC
 - Have classes at home centers, community centers there
 - Have catalogues and info about OLLI at senior centers, public places

- Increase membership among more ethnically-diverse population
 - Contact minority profs. at BCC, Williams, Bard to help us connect with their respective communities
 - Contact minority clergy to help us reach their members
 - Have lectures and classes related to their interests

Performance Indicators/Measures:

- Courses will be offered five evenings/week In Spring 2008,
- At least 2 life experience classes will be offered in Spring 2008
- At least 2 recreational outdoor activities will be held in Spring 2008:
- Compare number of members as of June 1, 2007 with number of members as of June 1, 2008; continue annual comparisons
- Review membership application to learn how each new and returning member learned of OLLI and/or why they chose to continue

Projected Completion Date: June 1, 2009

Responsible to Implement: Membership & PR Committees

GOAL 2: Increase Membership by Decreasing The Percentage Of Members Who Do Not Renew (1)

Objective A: Reduce overall yearly rate of “non-renewals” from the present 20% to 15%

(present non-renewal rate is about 20%, we know from “exit interviews” that in general about half of those are voluntary-the other half have moved out of the area, become incapacitated or died)

Strategies:

- Use our excel databases to contact “inactive” members 3 or 4 months before their anniversary, contact them by phone and letter (“we’ve noticed,” make them aware of upcoming events, offer an extension of membership time)
- Conduct “exit interviews” to determine how OLLI could have done better
- Make new members “feel welcome,” continue to welcome new members at first day of class, ask them to join for lunch (easy at BCC and Williams/Clark)
- Offer multi-year and lifetime membership

Performance Indicators/Measures: Pre and post count of number of members who choose not to renew

Projected Completion Date: September 2008

Responsible to Implement: Membership with input from IT Committee

GOAL 3: Motivate Current Members To Participate More Actively In OLLI Activities (1)

Objective A: To get members to take at least one course, and/or go to one Special Event and/or one Distinguished Speaker Lecture each semester

Strategies:

- Shorten classes to 1 hour so more can be taken per day
- Offer most popular courses at both North and South locations
- Offer sequential courses, like Survey of American Lit. I and II
- Group courses in venues (BCC, Williamstown, etc)
- OLLI members should introduce themselves and speak to people in classes and at events they do not know to make newcomers feel more welcome
- Distinguished Speakers should appear in more widely dispersed areas

Performance Indicators/Measures: Increase in average number of courses and activities per semester per member

Projected Completion Date: Spring 2008

Responsible to Implement: Curriculum, Membership and Distinguished Speakers Committees.

Objective C: To increase volunteer participation by 5% in committees/productive OLI activities

Strategies:

- Mentor new committee and activity volunteers
- Recognize volunteers' productive/successful contributions
- Profile in OLI newsletter

Performance Indicators/Measures:

- Presence of one mentor in each OLI committee

Projected Completion Date: Spring 2008

Responsible to Implement: Membership & Newsletter Committees

GOAL 4: Increase Number and Variety of Course Offerings (2)

Objective A: Increase number of courses by 20%

Strategies

- Convene area focus groups to determine what people want and what resources are available

Completion Date: Beginning Spring 2008

Responsible Committee: Curriculum committee

Performance Indicators

- Written description of course interests and resources
- Report shared with current committee

Completion Date: 3/31/2008

Responsible Committee
Strategic Planning C.

Objective B: Create additional models for course delivery and development

Strategies

- Research models at other Lifelong Learning Institutes
- Explore new instructional models (to supplement lecture format)
- Explore new instructional models (to supplement lecture format)
- Adopt most suitable models for OLLI
- Implement chosen models

Performance Indicators:

of new model courses introduced
Assessment of appeal among members

Completion Date: Fall 2008

Responsible Committee: Ad Hoc Instructional Format Committee (To Be Formed)

Objective C: Offer courses in places recommended by focus groups noted above

Strategies

- Digest focus group recommendations
- Identify venues; reserve time and space
- Use technology to show courses, programs in new, further removed venues

Performance Indicators: New venues selected; time and space reserved; courses/programs offered technologically in sites where not offered before

Completion Date: Start Spring 2008

Responsible Committee: Curriculum

GOAL 5: Expand Calendar Coverage (2)

Objective A: Offer programs at times not presently scheduled

Strategies

- Insert offerings between semesters; during summer, evenings and weekends

- Coordinate offerings of Curriculum Committee and Distinguished Speaker committee
- Turbo-charge or restructure curriculum committee
- Extend semester length via seminars and Study Groups
- Increase number of distinguished lectures

Performance Indicators: Increased number of offerings in additional time periods

Completion Date: Summer 2008

Responsible Committee: Executive Director, Curriculum

GOAL 6: Expand And Deepen Relationships With Education And Cultural Partners (2)

Objective A: Expand number of educational partners by two institutions and cultural partners by 50%

Strategies

- Continue recruiting partners
- Consider discounts and support of educational programs

Performance Indicators: New partnerships

Completion Date: Now and ongoing

Responsible Committee: Executive Dir. and Board Members

Objective B: Retain and Increase Partnership Activities by 10%

Strategies

- Restore Faculty Appreciation Event – open to all
- Freebies for lecturers
- Duplicate recent Williams College letter to faculty with other education and cultural partners
- Encourage Emeriti to participate in planning courses
- Add faculty members to curriculum committees
- Senior OLLI people attend important Partner functions
- Pursue Williams College Seniors for study groups
- Troll Partner catalogs for course ideas and lecturers
- Network with current and past lecturers
- Maintain contact with committed lecturers

- Use internet/e-mail to promote courses and publicize Partners' events
- Care and feeding of faculty friends
- Restore faculty appreciation event open to all
- Freebies for lecturers

Performance Indicators

- Schedule faculty Appreciation event
- Faculty join Curriculum Committee
- OLLI reps attend Partners' events
- Williams' Seniors lead study groups
- Increase teaching engagements by Partners' faculty and students
- Addition of Partners' faculty to Curriculum Committee
- Increase number of substantive contacts with faculty

Completion Date: Now and ongoing

Responsible Committee: Executive Director

GOALS 7: Establish Affordability Of Trips To Increase Participation 3)

Objective: Increase overall participation on trips (where possible): Update annually.

Strategies:

- Negotiate long term pricing relationships with vendors to become trip partners
- Give earlier promotional information (catalog, newsletter, email, etc)
- Offer discounts for early sign-up
- Develop a variety of programs with a wide range of cost options
- Develop cost effective options for food provision
- Make scholarships available for special events to members
- Target independent and assisted living potential members who are mobile
- Schedule weekend trips to attract the working population

Performance Indicators/Measures: Before & After Data

Projected Completion Date: ASAP

Responsible to Implement: Special Events

GOAL 8: Create Intergenerational Events (3)

Objective: Develop two intergenerational events per year

Strategies:

- Develop a family intergenerational activity, i.e. picnic or craft day
- Coordinate classes with high school, college students and faculty
- Develop program interchange between students and OLLI
- Develop intergenerational trips that would include students and faculty of OLLI's Educational Partners

Performance Indicators/Measures: Evaluation of 2 intergenerational events; Number held, Attendance

Projected Completion Date: 2007-2008

Responsible to Implement: Special Events Committee

GOAL 9: SHARE INFORMATION/EXPERIENCES WITH OTHER OLLIs (3)

Objectives: Arrange 1 meeting with another OLLI

Strategies:

- Explore other OLLI Special Event experiences and programs
- Explore combined programs
- Reciprocation with other OLLIs

Performance Indicators/Measures: Report by participants after completion of meeting

Projected Completion Date: June 2008

Responsible to Implement: Special Event Committee/Executive Director/President

GOAL 10: Create an administrative structure to enable OLLI to function effectively in the future and to implement the Osher proposal (4)

A. Objective: Develop a job description for the Executive Director so optimally this position serves as "Chief Operating Officer" with the following considerations:

- Clarify the title: Executive Director? Program Director? (The latter term is used in the OSHER proposal and bylaws; the former in Board minutes and colloquially)
- Should position be added to OLLI Bylaws?

- Implements the policies set forth by the Board of Directors
- Responsible to run the daily operations of the organization
- Reports directly to the President and/or Executive Committee of the Board and Dean of Lifelong Learning at BCC
- Attends all Board meetings
- Reports information to the Board and to the Dean of Lifelong Learning at BCC
- Meets regularly with the President of the Board, staff and representatives of Partner in Education colleges
- Attends OLLI committee meetings as necessary

B. Objective: Clarify the role of the Executive Committee in the OLLI by-laws with consideration of the following:

- Add Executive Committee to the bylaws
- Consists of the five officers of the organization: President, First and Second Vice Presidents, Secretary, Treasurer
- Should be available for consultation with the Executive Director

C. Objective: Clarify the role of the Board of Directors and President in the OLLI by-laws (duties and responsibilities) with consideration of the following:

- Setting policy for OLLI
- Establishing guidelines for the Executive Director and President to implement policies
- Serving as emissaries to the community

D. Reduce the size of the Board of Directors by revising OLLI's by-laws with the following considerations:

- Eliminate past presidents, other than the immediate past president, as members of the board. Board meetings are open to all OLLI members; therefore, past presidents may attend, like all OLLI members, without a vote and speak only when recognized by the President.
- The immediate past president serves *ex officio* as a voting member.
- The previous past president serves as Chair of the Nominations Committee
- Committee chairs report to the Board of Directors but may not serve on the Board
- Board members who do not participate for two consecutive meetings without good cause, are subject to removal by the board. This should be included in the by-laws
- A 3-year rotation cycle should be devised for Directors at-large

- An odd number of board members is recommended.

Strategy to Implement Objectives A, B, C and D:

- Create an *ad hoc* committee to update by-laws; develop job description for the Executive/Program Director; clarify role of Executive Committee, Board of Directors, President; and reduce the size of the Board by November 1, 2007
- *Ad hoc* committee will develop time-lines so that final actions and vote of members occurs at Annual meeting in June 2008.

Performance Indicators/Measures

- Board and membership consider and approve revised by-laws
- Board approves Executive Director's revised job description
- Board approves clarified role of Executive Committee
- Board approves clarified role of Board of Directors
- Board approves clarified role of President

Projected Completion Date: June 2008 (at Annual Meeting)

GOAL 11: Establish A Board Of Directors Training Program (4)

Objective: Develop a board orientation program for new members and a refresher session for all returning board members.

Strategies:

- Hire a professional in organizational development to be able to create training program to include the following:
 - review OLLI practices and procedures
 - team building component
 - committee assignments
 - review of roles of the Board of Directors, Executive Committee and Executive Director
 - fiduciary and legal responsibilities
 - any other items suggested by professional
- Seek resources from other OLLI's and non-profit organizations

Performance Indicators/Measures:

- Subjective evaluations by members of Board cooperation and decision making processes
- How many board members eligible to return, choose to return

Projected Completion Date: ASAP First for current Board and new board members; secondly for on-going (yearly before first board meeting)

Responsible to Implement: Executive Director

GOAL 12: Increase OLLI's Visibility to The General Public in a Broader Geographical Area (5)

Objective: To make more people aware of and knowledgeable about OLLI

Strategies:

- Display OLLI materials and membership forms in plain sight at every function.
- Have OLLI logo prominently displayed at all OLLI functions—both classes and community functions
 - Signs on speakers podium
 - Banners for all events
 - Large posters
- Community visibility via t-shirts/bookmarks/writing pads
- Increase PR efforts in Tri-State area to individuals, organizations, media
- Paid advertisements with coupons
- PR releases
- Develop personal contact with editors/radio and all publishers
- Maintain continuous awareness of OLLI's programs: Vehicles-weekly news publications, free- Penny Saver, Women's Times, newspaper inserts/supplements/magazines, Berkshire Theater Playbill programs, Colonial, Mahaiwe, Barrington Stage, radio programs; WAMC-guest feature, distribution of TV videos, television,
- Special 4 color printed quarterly programs
- Website
- All guests receive coded business cards which can be exchanged for one session. They put name and address on back to gain entry..
- Encourage OLLI members to introduce themselves to those around them at any OLLI function and encourage non-members to join
- Roving volunteers at public events disseminate information
- Take tables when viable at events
- Activate Speakers' Bureau
- Paraphernalia (promotional items) to take away
- Train people to do speaking engagements:
 - Slides
 - Power Point calendar (?)
 - OLLI members to give "mini" lectures as an example

Performance Indicators/Measures:

- Increased number of membership forms returned
- Number of business cards returned.
- Smiles
- Increased attendance at OLLI functions
- Increased inquiries (phone, e-mail)
- Registration form feedback
- Number of coupons turned in

Projected Completion Date: ASAP-no later than March 1st, definitely before Spring semester; 3 months

Responsible to Implement: Marketing and PR Committee; Chairperson or volunteer of Marketing, PR, Communication, Outreach Volunteers, Website C.

GOAL 13: Improve Internal OLLI Communications (5)

Objective: Less duplication of efforts, more efficient use of resources, and elimination of scheduling conflicts.

Strategies: Set up inter- committee meetings of chairpersons to coordinate plans and schedules

Performance Indicators/Measures:

- Fewer scheduling conflicts
- Less bickering
- Greater variety of offerings and presentations

Completion date: ASAP

Responsible: Exec. Dir

VII. Appendices

Appendix A. OLLI SURVEY RESULTS – ANALYSIS OF TRENDS

Christine Singer, Retreat Facilitator, August 29, 2007

Overview: Members of the OLLI retreat committee invited 80 members who are currently on the board or who actively participate within the organization to a two-day strategic planning retreat and to complete a “pre-retreat” survey. Thirty seven completed surveys were received by the August 28, 2007 deadline. Below is a summary of trends which appeared in the responses.

QUESTION #1: Based on your experience with BILL, please list up to three features you liked best.

- Courses (variety, quality, length)- 30 responses
- Opportunity to socialize/meet new people- 18 responses
- High caliber of lecturers- 10 responses
- Trips-9 responses
- Special events- 8 responses(i.e. Jacob’s Pillow, movies, dance program at Williams College, day at Williams College
- Special projects – 7 responses
- Publications (i.e. catalog, newsletters)- 6 responses
- Distinguished Speakers Series- 6 responses
- Volunteers Work (i.e. lecturing for the organization, serving on committee)-4 responses
- Diverse opinions/learning atmosphere/intelligent exchange-3 responses
- Trips associated with a course -2 responses (i.e. North Shore trip with Bill Fox)
- Single instructor courses -1 response
- Canyon Ranch programs -1 response

Questions #2, 4, 5 - Summary Of Trends Based On Responses To The Following Questions Grouped According To Break-Out Committee Topics:

- Question #2: Please suggest up to three improvements you would recommend in any area/s, i.e. program, organization, procedures, policies, marketing, membership
- Question #4: It would be most helpful if you would tell us what you would like to see come out of this retreat
- Question#5: Please tell us any idea you have that we did not elicit that would make OLLI great in your estimation

A. Membership-Recruit, Retain, Motivate (32 responses)

- Increase membership by presenting opportunities for fun and to increase social outlets for people new to Berkshire County (i.e. “teas”, “coffees” at the homes of board members or volunteers, making participants feel welcome)
- Increase diversity: younger people, ethnically diverse people and the disabled
- Form a committee of old members to interact much more with people attending classes or trips and ask them to join committees
- Emphasize retention of current members
- Extend membership to those who cannot afford the fees but are interested in the subject matter which we offer without it appearing to be charity or confrontational about income etc.
- Develop means of tapping more fully into the expertise and depth of experience of members
- Consider having OLLI serve as a conduit for other Berkshire organizations to encourage OLLI members to give back to the community
- Involve more members to actively work with OLLI so they feel a sense of ownership in OLLI
- Encourage members to participate in committee work
- Reach out to former and non-participants in small groups to elicit and clarify their concerns and be genuinely open to their opinions and needs

B. Academic Program: Courses, Distinguished Speakers, Seminars, Study Groups (21 responses)

- Develop guidelines for lectures and participants in regards to asking questions at the appropriate time, monitoring time so all participants have a chance to share ideas
- Encourage participants to be good listeners at lectures/seminars rather than making their point of view and not allowing speaker to present
- Allow members to take classes offered by partner colleges
- Assess the possibility of paying presenters to gain additional courses
- More emphasis on lectures, seminars, study groups and courses
- Deeper penetration into the faculties of Bard @Simon’s Rock and MCLA to increase teacher participation with OLLI
- More courses in South County and Columbia County
- Screen peer instructors for teaching ability and offer to train where necessary
- Cut Distinguished Speaker fee from \$10 to \$5 for members

- Offer a “Surprise Course”. Each week a different presenter on a different topic- allow people who don’t want to prepare a 5 or 6 week course, to do one 90-minute session on something they love, find fascinating, want to know more about them, etc.
- Better scheduling-no overlapping of time
- Screen prospective lecturers to insure their ability to guide a class
- A map of college buildings should be included with confirmation of registration
- Offer courses under the humanities umbrella, i.e. art, literature, history, science of a particular time or place
- Draw speakers from yet unexplored venues
- Review the “no pay” policy
- Consider attracting people from VT, Boston, Albany etc., just by covering “room and board”, perhaps call this a “Platinum Speaker” program

C. Educational Options: Special Events, Clubs, Activities (13 responses)

- Develop courses such as Sudoku, professional bridge instruction, scrabble, chess, fly fishing, fly tying
- More varied programs
- More trips
- More activities in the summer
- Initiate “foreign travel for singles” program by making relationships with Elderhostels
- Have more get-togethers so that academic learning is supplemented by other experiences
- Consider collaborations with some of the cultural facilities, developing joint programs
- Summer reading group
- Become more familiar with the people involved in OLLI and their interests

D. Marketing & Communication: Outreach (28 responses)

- Increase outreach to community
- Distribute poster/flier mailings to a growing number of Berkshire venues which will display our fliers, increase awareness of courses and trips
- Mailed catalog drops to all Berkshire libraries and other community locations with follow-up calls to inquire about the need for replacement copies

- More articles in the newspapers to bring the organization to life
- Push for OLLI articles in local publications (i.e. Berkshire Living Magazine)
- Market to churches
- More talks to local organizations and their members
- A greater effort to involve the community, at large, including families and school children who live in our surrounding communities
- Need to develop marketing tools to attract younger members of the community who could be looking for opportunities for learning
- Improve the OLLI web site so that it is more interactive, offers more information about the Berkshires, things to do, and networking opportunities. Have it become a place where people will go to gain information and want to become members.
- More newsletters

E. Organization: Board, Executive Director, Committees (26 responses)

- Let the membership know that they are always invited to Board meetings and include the date
- Keeping past presidents on the Board continues to support the stereotype that there is no interest in new participants and that a clique exists
- Open up organization's leadership; it appears closed
- Establish guidelines for conducting Board meetings from setting the agenda to running the meeting
- Clearly define the role of the Executive Director and President; Have Executive Director become the Chief Operating Officer of OLLI reporting to the President and Board who set policy
- Clearly define the objectives of all committees and roles of all committee members
- Improve the operation of the office so that products expected are products delivered in a timely manner. Create a responsive feedback system in which improvements needed are implemented with minimum delay and hassle.
- Need a strategic operating plan with a clear vision for the future that will allow us to make measured progress toward the Osher proposal goals
- Expand Board to reflect new outreach goals: younger, people of color, disabled
- Strong basis as to why we became an OLLI
- Redefine the organization to create a feeling of a “new organization” such that the leadership and Board become a much more effective, cohesive and cooperative where people

actively work on their projects and where a sense of respect, understanding and trust prevails

- Reconciliation of long-time BILL members to the newness of OLLI and changing ways; understand that change is not easy
- A dedication to making OLLI the best it can be by working together toward that goal
- A warmer feeling toward each other regardless of our “foibles”
- See the Board more unified. Too many people fighting each other. Civility needs to occur
- Having the retreat should help make OLLI great
- That the leadership provides for and welcomes the views of all participants creating an open dialogue
- It is important that a comfortable and mutually respectful relationship between all OLLI participants exists
- OLLI should stand for an opportunity to keep learning at any age, at a college level, and to meet like-minded others
- Put into action the many good ideas and goals in the Osher proposal
- To somehow recapture the early exuberance and positive nature of the group
- Examine the differences in goals between BILL and OLLI and then evaluate methods of transition
- Examine the OLLI leadership and work to present leadership that is open to new ideas, non-exclusive and accepting of others
- Publication of the annual operating budget so members can understand ACTUAL income and expenses
- Better coordination between committees. The old round table of chairs was helpful
- A plan for ensuring the future of OLLI with a leadership progression plan that fits with Olli’s needs and is not just based on who is willing to do the job
- Build a plan for ensuring the staffing of OLLI in a capacity-building framework

F. Miscellaneous (3 responses)

- Use the new funding in the best way possible and to maintain the new levels once the Osher funding stops by raising more funds
- Become an advocacy group as well as learners

QUESTION #3: How do you see yourself most effectively contributing to the success of OLLI?

- By asserting leadership that is constant and effective in the face of board/memberships personalities and agendas.

- Financial Planning
- Working on publications and written communications.
- Advisory capacity
- I'm pretty heavily involved with OLLI at this time; webmaster and Committee chair, and member of the Information Systems and Science Committees
- Past exp.
- Teach and Develop new courses and programs
- Working to put OLLI in the forefront of a "Successful Aging" program.
- Presently, I assist the Marketing/ PR Committee with writing press releases. In addition, I would be happy to create a comprehensive Berkshire, Columbia County and Vermont mailing list for catalog and/or flier drops. I will compose a cover letter to be included in these mailings. Someone else will need to call venues to get approval for drops and to call again to see if replacements are needed.
- In next year or two I would consider a Board appointment again.
- As the past college liaison, I think my historical knowledge may come in handy.
- I'm a good brainstormer for new concepts and themes.
- I was the executive director of an organization that raised about \$12 million annually. I have many contacts, and perhaps I could be helpful.
- Helping organizationally
- I serve on some committees and talk about OLLI with new Berkshire residents
- Currently am on the OLLI board as chair of the Distinguished Speakers Series.
- What can I do? Continue in my role or Information Systems Committee chairman. I would like to recruit some more members to help in my areas and for Media.
- Having served on many committees and having been actively involved in the organization for the past eight years, I can provide assistance wherever it is needed.
- Opening my big mouth
- Broad based managerial and organization skills and experience
- by trying to get more public recognition for OLLI, especially in northern Berkshire and Vermont
- In my particular case, I can remain on the curriculum committees and also offer my recollection of the past 13 years
- By teaching classes and serving as an individual who can bring Divergent views together for the sake of the organization

- I have limited capacity to help. Former trustee, former lecturer, but other volunteer activities make it difficult for me to contribute more to OLLI.
- I am an emissary for the program, talking about it and sometimes recruiting new members
- Running special events; teaching an occasional class session
- Probably through building a cooperative relationship with WMHT
- By sharing a decade of experience on the Social Science Committee with new members.
- Help improve image of OLLI as friendlier
- Committee participation
- Occasional teaching
- To continue to provide presenters with the means of passing on their wisdom and knowledge to the members in the smoothest possible way.

Appendix B. Retreat Agenda

BILL → OLLI: An Opportunity to Grow Even Better

September 10, 2007 9:00 a.m. – 3:00 p.m.

- I. Welcome And Introductions – *Stephen Radin, President*
(5 minutes)
- II. Overview Of Retreat Goals And Agenda – *Christine Singer, Facilitator* (5)

Retreat Goals:

1. Facilitate Transition from BILL to OLLI
2. Devise a strategic plan inclusive of specific goals, objectives, strategies, performance indicators/measures, project completion dates, and responsible people incorporating Osher Foundation requirements with a goal of maximizing organizational efficiency and effectiveness and making the transition as seamless as possible
3. Develop mechanisms to fully address all goals insuring optimal participation and communication among OLLI members, committee chairs, staff and board members
4. Orient Executive Director to OLLI, its members and their abilities

5. Gain increased investment and commitment from OLLI members to best meet identified mission, goals and objectives

- III. Timeline – *Elliott Vines* (15)
- IV. Benefits of Becoming OLLI at BCC – *Arthur Sherman* (15)
- V. Compiled Survey Trend Results –*Christine Singer* (30)
- VI. Group Process – *Christine Singer* (35)
- VII. Break-Out Groups: Develop specific, measurable objectives (90)
 1. Membership – Recruit, Retain, Motivate
Facilitator: Edward Epstein
 2. Academic Program: Courses, Distinguished Speakers, Seminars, Study Groups
Facilitator: Bill Vogt
 3. Educational Options: Special Events, Clubs, Activities
Facilitator: Helene Calman
 4. Organization: Board, Executive Director, Committees
Facilitator: Paul Flaum
 5. Marketing/Communications: Outreach
Facilitator: Lenore Rubin

LUNCH: 12:15 – 1:15 p.m. Participants sit at designated tables.

AFTERNOON

- VIII. Three 30-Minute "Add-Ons" (90)

Participants work with three groups of people, each different from each other and different from the morning group, to give input on three additional topics.

Each half hour, participants move sequentially to the topic that corresponds to the numbers printed on their badge, form a new group and "add on" to the work generated by the morning committee and preceding Add-On groups. The p.m. badge numbers match the break-out group designations above.

- IX. Summarize Tasks Accomplished – *Christine Singer* (15)

September 11, 2007

9:00 a.m. – 3:00 p.m.

- I. Overview Of Agenda – *Christine Singer* (15)
 - II. Review of Committee Goals and Objectives Developed to Date – *Christine Singer* (45)
 - III. Break-Out Groups (Participants return to original committees) (120)
 - a. Review all input received
 - b. Organize concepts into goals
 - c. Prioritize goals
 - d. Determine objectives under each goal
 - e. Develop strategies, performance indicators/measures, projected completion date and responsible person for each objective
 - f. Prepare easel sheets and worksheets to share material
- LUNCH 12:00 P.M. – 12:45 p.m. (45)

AFTERNOON

- IV. Presentation Of Work Product By Each Group (90)
- V. Next Steps – How Do We Get To A Finished Strategic Plan And Begin Implementation? – *Christine Singer* (15)
- VI. Retreat Evaluation – *Christine Singer* (25)
- VII. Concluding Remarks – *Stephen Radin, President* (5)

Appendix C. Songs and Cheers

Group: The Daisy Bells

OLLI, OLLI, we're so proud of you
 It's no folly, to see what you can do
 We'll have a celebration
 At our next commemoration
 And we will see all you can be
 As OLLI at BCC.

Group: The Song Birds

BILL was once our Lifetime Learning Institute
Now it's OLLI and we're going forward

Give me an O
O – Outstanding

Give me an L
L – Learning

Give me an L
L – Legendary

Give me an I
I – Innovative

Yea.....OLLI

Group: The "A" Team

O stands for Outgoing and Opportunity
L stands for Lifetime
L also stands for Leisure and Learning
I stands for Introduction, Innovation, Inspiration

OLLI stands for the Future!
Here's to OLLI, by Gosh, by Golly

Group: The Jolly OLLIs

OLLI is no folly
We are truly jolly
OLLI will surely fill
What used to be BILL

Our aim is to teach
To learn and to grow
There is so much
We wish to know

So, Go OLLI Go!

Group: The Mothers

O is for the opportunities provided
L is for love of learning true
L is for leisure time to gather
I is for interesting classes too

Put them all together they spell OLLI,

The future of life long learning for me and you.

OLLI (to the tune of Day O) by Roz Citrin

OLLI oh ah ah ah li

The day is bright with a learner's delight
A trip I'll take and see all the sights

OLLI oh ah ah ah ah oh ah OLLI

The day is bright with a learner's delight
A trip I'll take and see all the sights

Come Mr. OLLI man tell me your partners
BCC and MCLA

Come Mr. OLLI man name some more partners
Williams and Bard also light the way

OLLI oh ah ah ah li

Semester starts and I want to go learn
A trip is planned and to travel I yearn

Math and history, science too
That is just to name a few
Opera, concerts, ballets, too
These are offered just for you

OLLI oh ah ah ah li

The day is bright with a learner's delight
Enthusiasm sparks the night

Trips and courses fill our day
And good fellowship is our way
Trips and courses fill our day
And good fellowship is our way

OLLI oh ah ah ah li

The day is bright with a learners delight
The day is bright with a learners delight (FADE OUT)