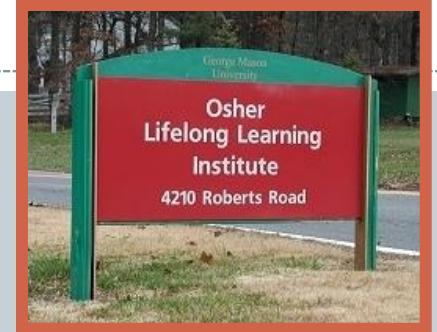




OLLI 2013



EMBRACING THE CHALLENGES OF GROWTH



Strategic Planning for OLLI @ Mason



- **Membership growth:** It is essential that we continue at the present rate—3%-5% a year. Growth puts increased demands on facility limitations, parking, restrooms, and staff.
- **Financial:** Dues and endowment are our major sources. With respect to the dues: Do we keep them level or have a slight increase? There was general consensus that we should not decrease them.
- **Endowment:** It was the general opinion that we should put the money from the second endowment in the bank and seek financial aid from such other parts of the community as corporations.

Strategic Planning for OLI @ Mason



- **Facilities:** We have limitations in both the Tallwood and Loudoun locations. Do we need to buy or lease additional space? Should OLLI anticipate funding all facility expansions?
- **Program:** How do we maintain a quality program? How do we redefine programs? Should we build on the lines of curricula that exist in small liberal arts colleges?

Strategic Planning for OLLI @ Mason



- **Structure:** What should our future structure be? We need to look at the resource group structure and consider staff expansion. We need to formalize how the committees work and focus on building their memberships.
- **Technology:** We need to position OLLI to take advantage of new technology to enhance our learning opportunities.

Key suggestions from OLLI leaders

5

- ❑ Need for advance thinking about a membership of 1500 members.
- ❑ Develop a mechanism for coordination and cooperation between Program committees (resource groups).
- ❑ Review the committee structure.

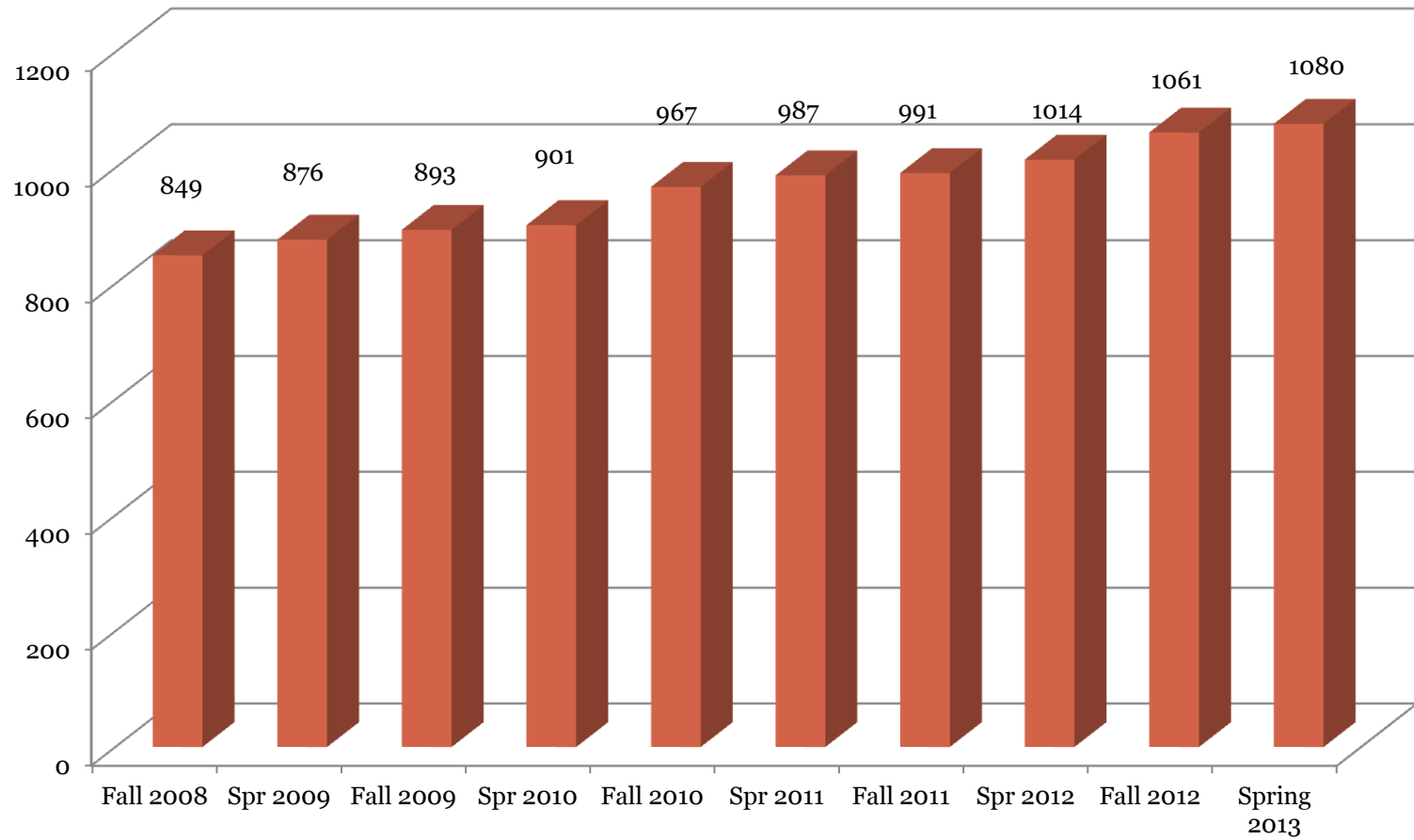
Key questions from OLLI leaders

6

- ❖ How do we increase volunteerism and how do we define it?
- ❖ Should we consider hiring additional staff or increase the hours of existing staff to improve cooperation on program planning?
- ❖ Should we extend OLLI campuses to other places in Northern Virginia?
- ❖ What if George Mason does not provide more space in Fairfax?
- ❖ Could we add classes in Loudoun and Reston on Friday? Space is not an issue but developing additional programs might be a problem. Clubs and planning meetings are held on Friday at Tallwood.

OLLI Membership Growth 2008-2013

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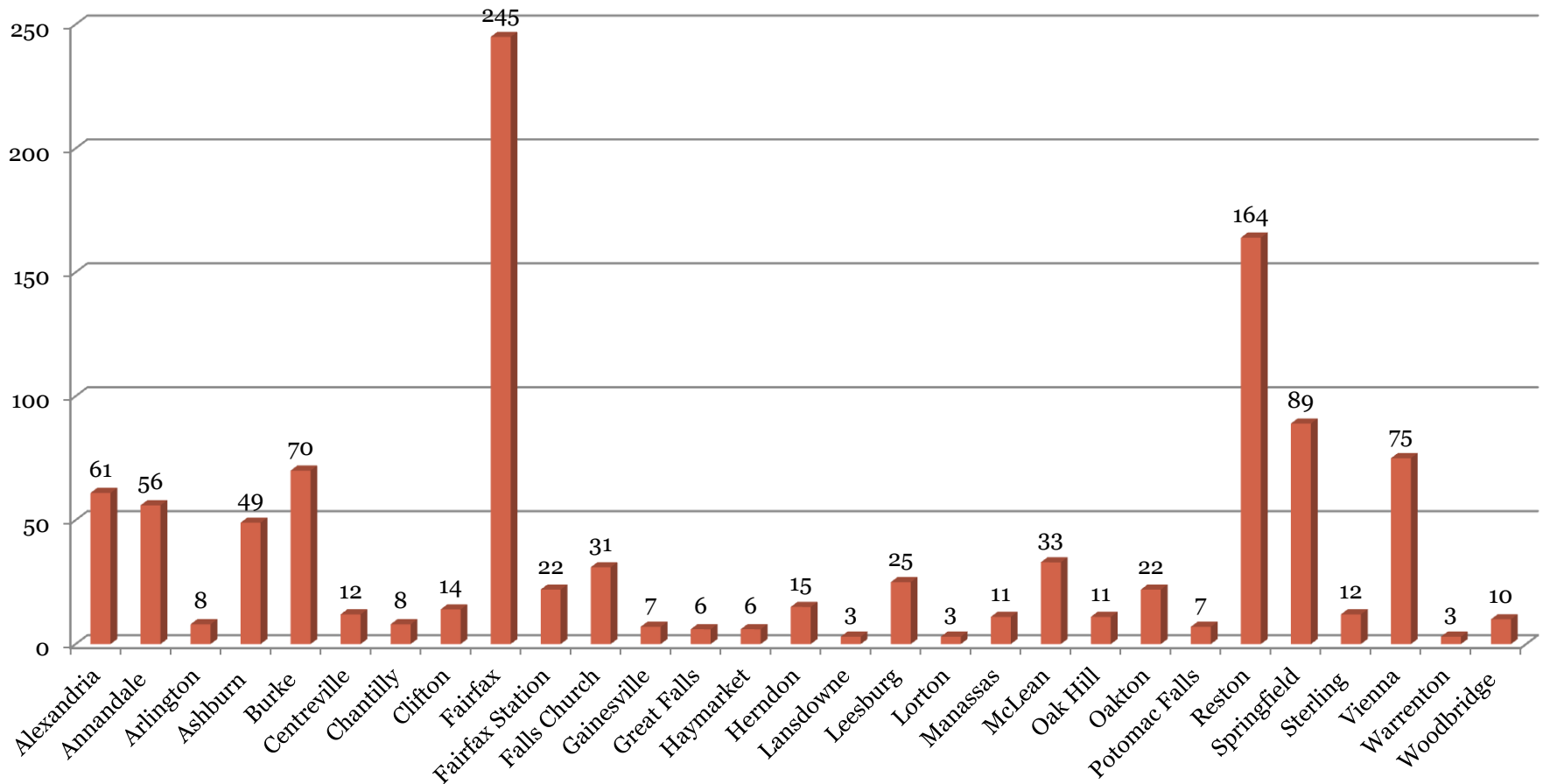
Growing and Changing

8

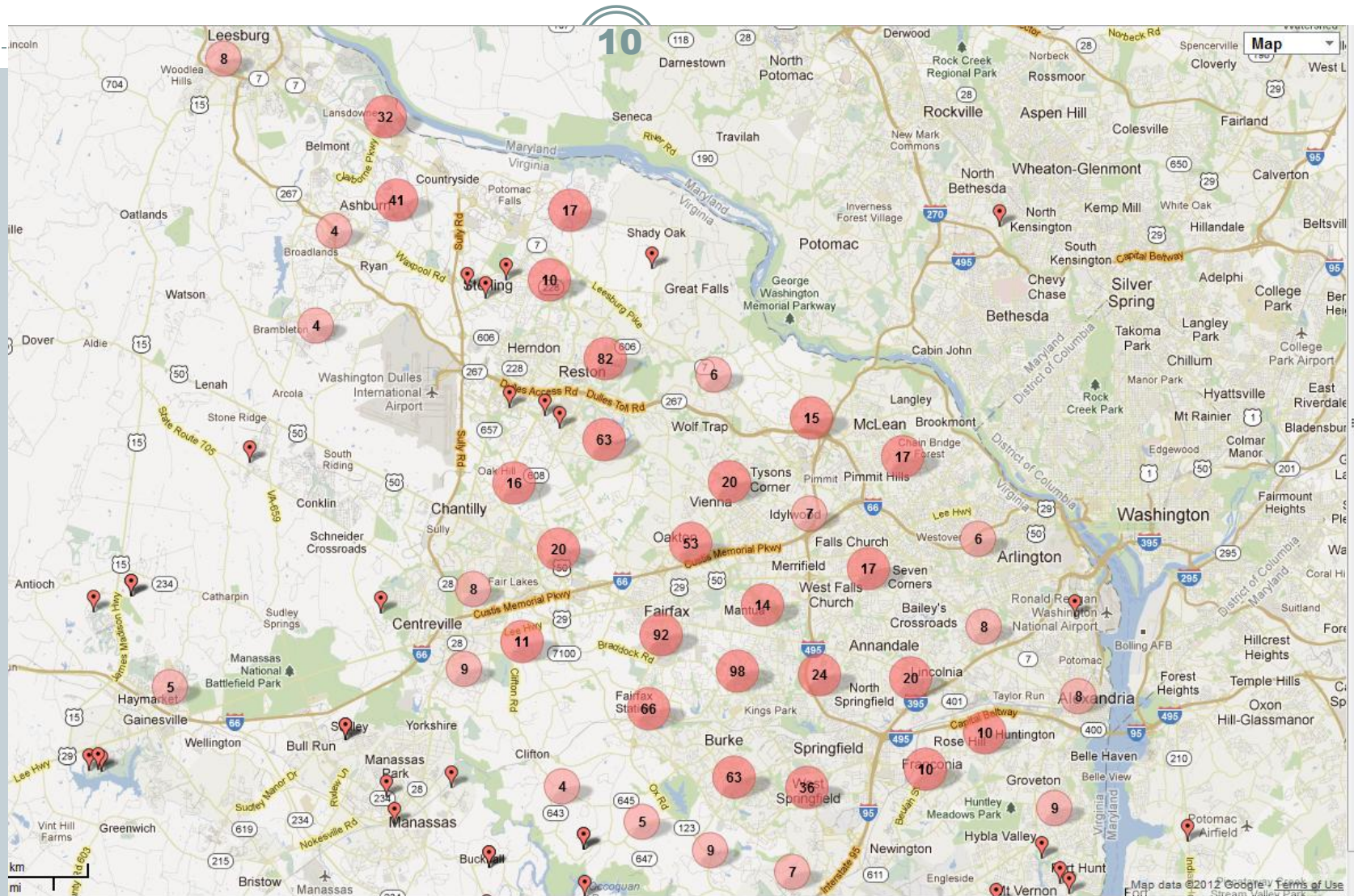


- 1080 members
- 267 in the Fairfax area
- 159 in the Burke/Springfield area
- 100 members in Loudoun County
- 156 members in eastern Fairfax County
- 25 members in western Fairfax County
- 976 took classes during the spring term
- 75% register and pay online
- Typical member takes between 3-5 courses per term

OLLI MEMBERS COME FROM MANY COMMUNITIES



OLLI MEMBERSHIP Distribution



The Program

11

During 2012, there were ...

- ❖ *338 “courses” – meaning multi-week, generally four or eight weeks*
- ❖ *58 “special events” – meaning one-time lectures or presentations*
- ❖ *35 “trips” – meaning visits to sites or performances*

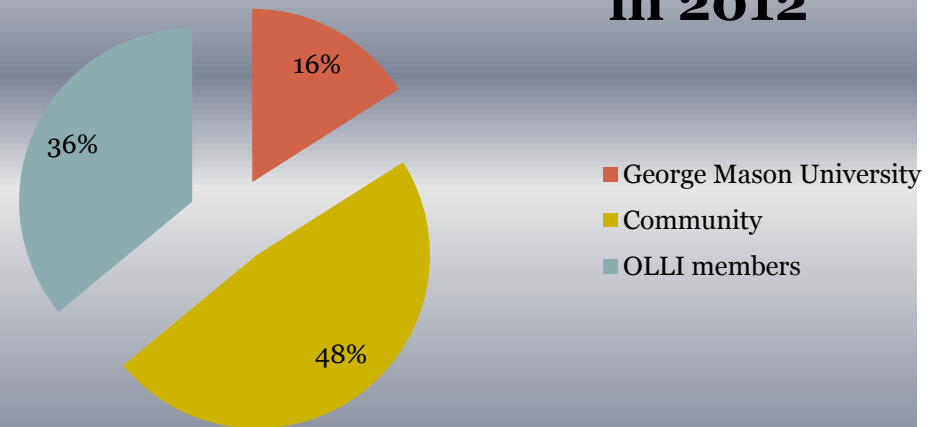
Where do our speakers come from?

12

“Speakers” give a lecture or make a presentation for a special event

- **66 Mason faculty (16%)**
- **191 Community (48%)**
- **146 OLLI members (36%)**

Speakers for OLLI courses in 2012

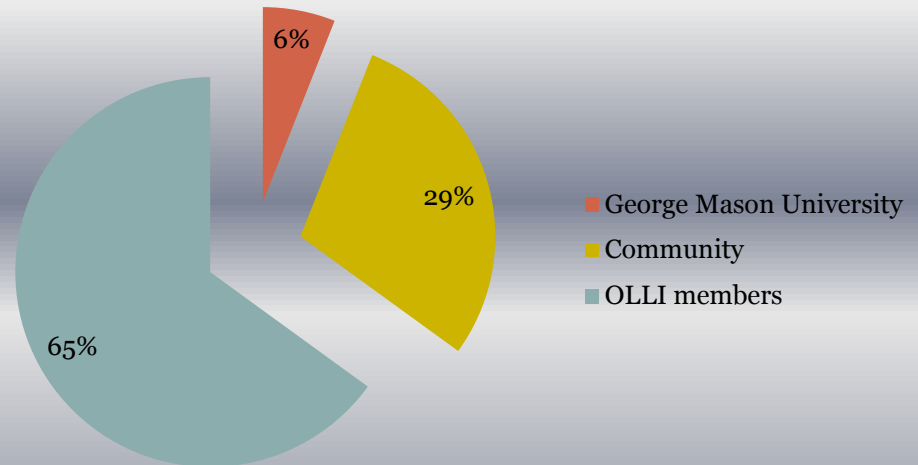


Where do our instructors come from?

13

“Instructors” teach a full course (multiple weeks)

- **24 George Mason faculty (6%)**
- **116 Community (29%)**
- **259 OLLI members (65%)**



Instructors for OLLI courses in 2012



The OLLI Finances

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INCOME DURING 2012:

DIVIDEND AND INTEREST INCOME	\$ 563
OSHER ENDOWMENT REVENUE	\$ 37,265
MEMBERSHIP DUES - REGULAR	\$ 380,290
<i>TOTAL FUNDING</i>	<u>\$ 425,048</u>



The OLLI Finances

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EXPENDITURES DURING 2012:

PAYROLL AND RELATED TAXES	\$ 225,368
GENERAL AND ADMINISTRATIVE	\$ 61,199
FACILITIES	\$ 40,736
EQUIPMENT	\$ 25,268
PUBLICATIONS	\$ 16,106
PROGRAM	\$ 14,250
MEMBER SERVICES	\$ 2,717
LANDSCAPING	\$ 2,993
HOSPITALITY	\$ 1,836
DEVELOPMENT	\$ 1,234
TOTAL EXPENSES	\$ 394,026



The OLLI Finances

16

**CASH RESERVES AT THE END OF THE
YEAR WERE \$151,511**

**(THIS FLUCTUATES THROUGHOUT THE YEAR, REACHING
A LOW POINT DURING THE SUMMER PRIOR TO FALL
REGISTRATION)**



Other Available Funds:

17

(AS OF APRIL, 2013)

OLLI RESERVE-- \$68,250

**CAPITAL EQUIPMENT AND
TECHNOLOGY REPLACEMENT FUND –
\$34,142**



FRIENDS OF OLLI

DONATIONS DURING 2012: \$ 35,361.89

EXPENDITURES DURING 2012: \$ 38,565.73

✓ Financial Assistance	\$ 1,225
✓ Mason Scholarships	\$14,500.00
✓ A/V Equipment	\$5,642.96
✓ Teleconferencing equipment	\$13,428.12
✓ Donation to Fall for the Book	\$1,500.00
✓ Printing - OLLI Ink & Poets of OLLI	\$769.65
✓ Moved donation to Reserve Fund	\$1,500.00

Challenges

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- Maintaining and strengthening our outstanding **program**
– developed by volunteers? More staff involvement?
- Providing **technology** solutions which make our program accessible to more members
-- expansion of video teleconferencing?
- Obtaining **facilities** that are worthy of the high quality of our program – safe, accessible, appealing – more off-site rental space?



Great minds never stop learning