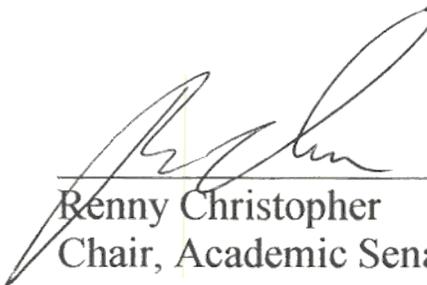


SENATE POLICY 03-13

Motion: to approve the Osher Lifelong Learning Institute
Passed at the December 9th, 2003 meeting of the Academic Senate

Approvals:



Benny Christopher
Chair, Academic Senate

2-25-04
Date



Richard Rush
President, CSU Channel Islands

3/2/04
Date

Be it resolved that the Academic Senate CSUCI recommends the establishment of the Osher Institute for Lifelong Learning. The Institute will be under the auspices of Extended Education. The purpose of the Institute will be to provide educational opportunities for a mature population of learners who are interested in "learning for personal fulfillment". The proposed Channel Island Institute will secure substantial and ongoing funding from the Osher Foundation. No additional funding from CSUCI will be requested. The Institute will be a member of a network of Osher Lifelong Learning Institutes that exist on 18 campuses in four states - including on eight CSU campuses.

To be eligible for funding from the Osher Foundation, an Institute must be approved by the Senate and the University. The funding would begin in January 2004. Therefore, the Committee requests that the first reading of the proposal be waived in order to expedite the process of Senate approval.

OSHER LIFELONG LEARNING INSTITUTES: A PROGRAM OF THE BERNARD OSHER FOUNDATION

Background

The Bernard Osher Foundation is a charitable foundation established in 1977 by Bernard Osher, a businessman and community leader. His philanthropy has benefited a wide range of educational, cultural, and other nonprofit organizations primarily in the San Francisco Bay Area and his native Maine. In the 1990s, the Foundation funded a series of Osher Scholar programs that provide scholarship assistance for post-secondary education to nearly thirty colleges and universities as well as professional and technical schools in California and Maine.

It was a logical extension of the Foundation's focus on education to consider the needs of more mature students who are not necessarily well served by standard continuing education programs. Courses in such programs attract students of all ages who are matriculating to complete degrees or to acquire career-advancing skills. By contrast, the interest of more senior students, many of whom are at retirement age, is in learning that does not involve examinations and grades. They have put the climbing of career ladders behind them and want to learn for the joy of learning and personal fulfillment.

In the fall of 2000, the Foundation's leadership began looking into lifelong learning programs. It was fortunate in having an example of a highly respected program at the nearby campus of the University of San Francisco – the Fromm Institute of Lifelong Learning. The Fromm Institute, established by Alfred and Hannah Fromm nearly 30 years ago, is known not only locally but nationally for the quality, variety, and continuity of its educational programs for older adults. The Institute's executive director, Robert Fordham, was generous in providing counsel to the Foundation.

Initial Grants

In early 2001, the Foundation gave an endowment grant to the University of Southern Maine, which had a successful "Senior College" in operation. The grant made it possible for the University to improve and extend the excellent program it was already offering. The name of "Senior College" was changed to "Osher Lifelong Learning Institute."

Then contact was made with Sonoma State University in Northern California (a member of the California State University system), where a well-regarded community leader suggested developing a Fromm-like institution on the campus. In the summer of 2001, the Foundation awarded a \$100,000 annual grant followed by two annual renewals in the same amount recognizing the progress made in establishing and developing a fine lifelong learning program.

Second Cycle

During the fall and winter of 2001, the Maine and Sonoma programs continued to make exceptional progress in serving seasoned adults in their respective communities. The Foundation was pleased with the results and decided to join the “lifelong learning” field in a significant fashion. The concept of a network of Osher Lifelong Learning Institutes was compelling, and requests for proposals were sent to the remaining 22 universities in the California State University system as well as to the nine universities in the University of California system.

In November, 2002, the Foundation Board made initial grants of \$100,000 to six campuses in the CSU group (Bakersfield, Cal Poly at San Luis Obispo, Dominguez Hills, Hayward, San Francisco, and San Jose) and four campuses of the UC system (Davis, Riverside, San Francisco, and Santa Cruz). A separate award was made to the University of Vermont. In February, 2003, two more CSU campuses (Fullerton and San Bernardino) and two more UC campuses (Berkeley and Irvine) were awarded Osher Foundation grants along with the University of Hawaii at Manoa. With these additional grantees, the Foundation was supporting Osher Lifelong Learning Institutes on 18 campuses in four states. In April 2003, the outstanding progress demonstrated by Sonoma State University led to an endowment grant of \$1 million along with its third year of \$100,000 in operating grant support.

The First Osher Lifelong Learning Institute Conference

In order to provide a forum for the exchange of information and the encouragement of cooperation among members of the Osher Lifelong Learning Institute network, the Foundation supported a two-day conference, with Sonoma State University serving as host, in April 2003. Each of the campuses sent three-person teams to the event (including the out-of-state grantees -- Maine, Vermont, and Hawaii), and the response from the participants was uniformly positive. It is thought that such conferences might be an attractive feature of the Osher Lifelong Learning Institutes program going forward.

Characteristics of the Osher Lifelong Learning Institute Grants

1. The Foundation is not highly prescriptive in the type of lifelong learning program it will fund. Its main concern is to support the creation of new programs or the strengthening of existing programs in lifelong learning at college and university campuses. It sees that there are many variations on the theme and encourages each grantee to find a model best suited to the needs and interests of its community.
2. The Foundation encourages the involvement of emeritus faculty and sees the benefit of a close relationship between the university or college and the lifelong learning unit, including the provision of space on campus for its classes.
3. The Foundation hopes that any lifelong learning program will over time attract funding beyond the Osher grant(s), such as membership fees, in-kind support from the host institution, and local corporate and foundation contributions.
4. For its part, the Foundation offers grants of up to \$100,000 a year for up to three years to develop and implement lifelong learning programs. Upon demonstrated success, the Foundation will consider establishing endowments of at least \$1 million to support individual Osher Lifelong Learning Institutes.
5. The designation of each Osher-funded program as an “Osher Lifelong Learning Institute” is a condition of the Foundation’s grant making, as is the use of a logo that consists of a simple circle with the words “Osher Lifelong Learning Institute” arranged within.
6. While the current Osher Lifelong Learning Institutes are found in New England and the Western United States, Foundation support for a national network of such programs is anticipated.

August 2003

Costs	<i>Cost</i>	<i>In-kind</i>	<i>Total</i>
Personnel			
Administrator: .2 FTE (Gary Berg) .15 x \$101,000		\$15,150	\$15,150
Support staff: .5 FTE TBH .5 x \$34,000	\$17,000		\$17,000
Registrar: .1 FTE (Jane Wanberg) .1 x \$38,000		\$3,800	\$3,800
Subtotal personnel (full benefits)	\$17,000	\$18,950	\$35,950
Benefits (31.61%)	\$5,374	\$5,990	\$11,364
 Program coordinator: .5 FTE .5 x \$50,000	 \$25,000		 \$25,000
Faculty: 8 courses x \$1,500/course (2 sessions in 2004)	\$24,000		\$24,000
Subtotal personnel (reduced benefits)	\$49,000	\$0	\$49,000
Benefits (11%)	\$5,390	\$0	\$5,390
<i>Subtotal personnel</i>	<i>\$76,764</i>	<i>\$24,940</i>	<i>\$101,704</i>
 Operations			
Travel to Osher LLI conference (assume West Coast) 3 persons x \$200 air, \$200 hotel, \$70 per diem, \$30 trans	\$1,500		\$1,500
Program supplies: \$350/mo x 12 mo	\$2,100	\$2,100	\$4,200
Marketing (printing, postage, ads)	\$20,000		\$20,000
Facilities			
Class: \$3000/session	\$3,000	\$3,000	\$6,000
Office: 2 office equiv x 500 sq. ft x 12 mo x \$1.50/sf/mo		\$18,000	\$18,000
Course materials: 8 courses x \$400 each X 2 sessions	\$6,400	\$3,600	\$10,000
Equipment (equiv): 8 courses x \$300 each X 2 sessions		\$4,800	\$4,800
Telephone/FAX/Internet service: \$120/mo x 12 mo	\$720	\$720	\$1,440
Consultant (Les Adler): \$1,000/day x 2 days		\$2,000	\$2,000
Consultant for PR & Marketing: \$300/day x 20 days	\$6,000		
 <i>Subtotal operations</i>	 <i>\$38,220</i>	 <i>\$34,220</i>	 <i>\$66,440</i>
 <i>Total Costs</i>	 <i>\$114,984</i>	 <i>\$59,160</i>	 <i>\$168,144</i>
 Revenue			
Tuition: Est. 100 (2 sessions @ 50) participants x \$150/session	\$15,000		
Bernard Osher Foundation investment	\$100,000		
CSU Channel Islands contribution	\$59,160		
<i>Total Revenue</i>	<i>\$174,160</i>		

The Osher Lifelong Learning Institute at California State University Channel Islands

A proposal to the Bernard Osher Foundation

1. The Need for an Osher Lifelong Learning Institute at California State University Channel Islands

The need in terms of demographics

✓ *The Graying of America.* There is no doubt that America is aging, and this upward trend in average years is due to two factors: increased life span and increased birth rate. In 1900, the average male lived to be 47 years old; today a man can expect to live into his late 70's. And, while the life span increases, the post WWII baby boom heads into retirement. While the American population as a whole is expected to increase by almost 50% by 2050, the 65+ age group is projected to grow by 135%.

The Graying of Ventura County. This national trend is mirrored in Ventura County, where the U.S. Census reports from 2000 show the County's 60+ residents as 14% of the 753,197 total population, the same percentage as is reported nationally. According to the Ventura County Agency on Aging, older population is unevenly distributed throughout the County. The two communities closest to CSU Channel Islands demonstrate this, though both show an upward trend in senior population. Oxnard, still primarily a farming community of 170,358 residents, had only 11% indicate they were 60+ at the time of the census. However, Oxnard is undergoing a very rapid socio-economic shift, after having been "discovered" as a prime residential area with beach frontage much less developed (and much less expensive!) than other nearby areas. Consequently, in the past five years, the value of existing homes has soared 211%, and major new housing developments have been built or are on the drawing boards. A full 22% of this planned new building has been designated as senior communities, senior townhouses/apartments, or senior residences. Realtors comment that the new housing is being snatched up by higher income and better-educated "empty nesters" than Oxnard has ever attracted in the past.

Camarillo, a community of 57,077, also shows an increase of seniors in the population as a whole—but with a much slower growth rate due to the high level of existing development and the expense of housing as a whole. Currently more than one in every five Camarillo residents is over the age of 60—a rate almost double that of the County in the aggregate. These seniors are well educated, with 27.6 reporting completion of some college but no degree, 9.4% reporting an Associate degree, 21.7% reporting a Bachelor's degree, and 11.2% reporting graduate or professional degrees.

Other areas less proximate to the campus also show higher-than-average percentages of seniors. For example, Ojai, 31 miles away, has 22% of its 7,862 population listed as 60+; and areas of Simi Valley and Thousand Oaks, 20 and 13 miles from campus, show 27% and 22% of their populations as over 60.

Furthermore, the County's seniors tend to be active and with adequate financial means. Only 17.1% of Ventura County's population of persons over age 65 reported a mobility or self-care limitation. This is considerably less than the national figure of over 21% and paints the picture of a generally healthy and mobile older population. Also, only 6% of the County's full 60+ population are living in poverty, well below the national rates. In Camarillo, the rate is 4%, and in the City of Oxnard, the rate is 10%.

The need in terms of interest and demand.

This characterization of active, interested seniors is certainly what we found when we held a meeting at Leisure Village first in Spring of 1999, later in December of 2001. Most recently in November, 2003 we

discussed the institute with key education committee members. Leisure Village is a community of over 3,000 persons age 50+, less than three miles from CSU Channel Islands. The idea of the meetings was not to hold a formal needs assessment hearing but simply to share the unfolding academic directions of the new University and hear the thoughts of some local residents likely to be potential participants. At each session, more than 30 residents attended as CSU Channel Islands academic planners presented.

During a question and answer session lasting well over an hour, the group enthusiasm grew, as they identified the types of seminars they'd like to take, discussed the fee structure and the need for scholarships, provided suggestions for program operations, and generally exhibited an encouraging level of initial buy-in. As they noted, the local community college and adult school provide trips and courses in crafts and hobbies but few—if any—courses of intellectual or cultural substance. Traditional academic content courses are offered during the day in the credit mode with homework and exams—and, as one sprightly 75+ commenter noted, “having me sitting next to a 19 year old with a skateboard under his desk.” Evening courses often attract an older group of persons finishing their degrees while working full time, but are difficult for seniors to access due to night driving issues and also carry the traditional credit requirements. Thus the group felt that an intellectually and culturally challenging seminar series, offered during the day to seniors only, would be a wonderful addition to their activity menu.

Another interest expressed was in issues related to services, such as caregiving, grandparenting, and volunteerism. Several participants indicated that they had been searching for workshops or seminars that would provide an overview of the societal shifts behind changing needs, the options available, successful strategies, and local resources and opportunities.

The prospects for a successful program

The demographics, the enthusiasm of the local seniors, and the lack of similar programming anywhere in the County all speak to the prospect of a very successful Osher Lifelong Learning Institute (OLLI) at CSU Channel Islands. But perhaps the most important harbinger of success is the University's commitment to the OLLI concept, dating back to the original strategic planning conducted by the CSUCI community involvement task force. This group identified early in the planning stages for the campus the need to address the community's senior population in a way that would meet their needs and create lasting bonds with the institution. The OLLI is the perfect mechanism to accomplish these goals.

2. Summary of previous/current lifelong learning programs.

As detailed in Section 8, California State University at Channel Islands is the newest member of the CSU system, opening to upper division students in 2002 and the first class of freshmen this fall. While this stage of infancy does not provide an extensive history of lifelong learning programs, it represents a unique opportunity to begin an Osher Lifelong Learning Program as a fundamental part of a new, vibrant, and growing university campus.

3. Description of the proposed program

Mission/vision

In the initial stages of planning for an Osher Lifelong Learning Institute (OLLI) at Channel Islands, the President and the Director of Extended Education contacted a group of community leaders and senior CSU Channel Islands faculty to review the research collected on similar programs and begin the discussion of our needs for an OLLI and how such a program might best be structured on our campus. From this initial meeting, an ad hoc Advisory Board was developed, as discussed in section 5 below.

Under consultation with ad hoc Advisory Board members, we have developed the following mission and vision statements for the proposed Osher Lifelong Learning Center at CSU Channel Islands:

The *mission* of the Osher Lifelong Learning Center at CSU Channel Islands is to offer intellectually challenging courses and learning opportunities led by current and emeritus faculty and other experts in an exciting program at the lowest possible cost for adults over the age of 50.

The *vision* of the Osher Lifelong Learning Center at CSU Channel Islands is of a learning community of persons ages 50+ who wish to grow, expand, and continue to explore meaning and imagination through the pursuit of knowledge provided in a multi-dimensional, high-quality, stimulating educational program.

Program structure

The proposed program structure is quite similar to that of the Osher Lifelong Learning Institute (OLLI) at Sonoma State University. Les Adler, Dean of the School of Extended Education at Sonoma State, has graciously shared their experience with us, and the two campuses are sufficiently similar—except in age—that we feel their successful OLLI model will also be optimally successful at CSU Channel Islands.

Our design for the program structure is influenced also by the fact that our campus is virtually surrounded by senior communities, primarily populated with very active seniors. Thus our projections for numbers of participants in the initial years—and our program design to accommodate those participants—seem realistic.

The program year is designed in eight-week sessions. Each session will offer eight courses—7 intellectual and cultural enrichment courses and one elder public service course—with smaller courses being held in meeting rooms on campus, and larger classes being held in the conference halls and other facilities as available.

The calendar for 2004 is projected below:

<i>Activity</i>	<i>Summer 2004 session</i>	<i>Fall 2004 session</i>
Planning	January-May	May-July
Recruitment/outreach	February-April	May-August
Institute open house	May	August
Classes begin	June	September
Classes end	August	November

Classes will be offered at those times most convenient for seniors: mid-morning, starting at 10:00 a.m. and early afternoon, starting at 1:00, with each class lasting one hour and forty minutes. This schedule also provides a “wrap-around” lunch hour, and students will be encouraged to stay (or come early) and dine together from 11:45-1:00 Monday through Thursday. Faculty will be requested to plan to dine with the OLLI group for at least four of the eight weeks, so that at least one faculty member will be in the dining area each day. This added social element will actually continue the seminar dialogue in a more casual setting that will support and enhance the development of the learning community.

Faculty

CSU Channel Islands will strive to use only current and emeritus faculty and other experts in the OLLI. Naturally, given that the campus is still in its infancy, the emeritus faculty will be drawn from our sister campus to the east, CSU Northridge, the University of California Los Angeles, and the University of California Santa Barbara. Because the Channel Islands area is a destination point for many retirees, it is clearly possible that emeritus faculty from institutions across the nation may be living here and may be recruited as instructors. Tentative faculty members for the program are named below. Their resumes appear in the Appendix to this proposal.

Emeritus Faculty

Lillian Hawthorne, Emeritus, University of Southern California

Ken Jones, Emeritus, CSU Northridge

Martin Kaplan, PhD, distinguished research professor, Emeritus, Northern Illinois University

Joyce Kennedy, Emeritus, CSU Northridge

Tom McMillan, Emeritus, CSU Northridge

Delores Rains, Emeritus, St. John's Seminary College

Vicky Sharpe, PhD, Emeritus, CSU Northridge

Current CSU Channel Islands faculty

Virgil Adams, PhD, Assistant Professor of Psychology

Harley Baker, PhD, Assistant Professor of Psychology

Rainer F. Buschmann, Ph.D, Assistant Professor of History

Irina Costache, PhD, Associate Professor of Art History

Jacquelyn Kilpatrick, Associate Professor of English

Jack Reilly, Professor of Art

Curriculum content/possible course offerings

As mentioned above, CSU Channel Islands plans to offer a total of 8 courses during each session. The Advisory Board, which includes faculty, reviewed the enrollment figures from Sonoma State University and interviewed several other OLLI programs more recently funded about the course offerings that had proven to be most attractive for them. The period of January through April will be used to conduct an educational needs assessment and for course/program development. The following is a tentative list of subject areas we are considering:

Art and Art History

Two-Dimensional Media

painting

drawing

illustration

mixed media

Three-Dimensional Media

sculpture

ceramics

Digital Media Art: Time-Based Media

digital imaging and compositing

digital film and video art

3D computer animation
visual effects

Communication Design Technology
graphic design
web design
interactive multimedia

Art History
History of Art
Interdisciplinary Topics

English

Renaissance Literature and Art
Psychopathology in Literature
Writing Science
Literature of the Environment
Multi-Cultural Literature
Creative Writing

History

History of Southern California Chicano Art
Narratives of Southern California
History of the Pacific Islands
History of the Mediterranean
Women in History

Psychology

Psychological Ethics and Moral Philosophy
Psychology of Art and Artists (ART)
Psychopathology and Literature (ENGL)
Psychology and Traditional Asian Thought
Psychology and History of Asian Warrior Cultures

One course in each session is planned to be an elder public service program. Though just as stimulating and thought-provoking, these final courses will have a direct and practical application to the lives of

seniors. This application may be directly for the participant (e.g., “Keeping Yourself Healthy for the Second Half: A guide to physical, mental, and emotional health after 50”), for the participant’s family or family members (e.g., “Full-Time Grandparenting: Maintaining health and sanity while raising a second family”), or for the community (e.g., “Making a Real Difference: Becoming a reading tutor for K-1 children”).

The first in this series will be “Elder Care: The options, resources, costs, and emotional considerations.” This seminar will give older students an overview guide to elder care, including local resources for further investigation. Because gerontologists and sociologists agree that America does not have strong cultural mores for the care of the elderly, this seminar is essential for those who are—or are facing—the care of elderly parents, spouses, or family members. The course will be taught by Diana Casey, PHN, MSN, and an acknowledged expert in elder care in Ventura County.

Sample Schedule

Day	Time	Course
Monday	10:00-11:40 a.m.	Interdisciplinary Topics: Impact of American film on 20 th Century America
	1:00-2:40 p.m.	Elder Care: The options, resources, costs, and emotional considerations
Tuesday	10:00-11:40 a.m.	Multi-Cultural Literature
	1:00-2:40 p.m.	Creative Writing
Wednesday	10:00-11:40 a.m.	History of the Pacific Islands
	1:00-2:40 p.m.	Psychology and Traditional Asian Thought
Thursday	10:00-11:40 a.m.	History of Art
	1:00-2:40 p.m.	Two-Dimensional Media

Timeline

CSU Channel Islands began planning our application for an OLLI several months ago. During this time, we have already completed the following activities:

- ✓ Secured and analyzed the demographic data
- ✓ Conducted an informal needs assessment with local senior community residents
- ✓ Discussed the operation of an OLLI with Sonoma State University
- ✓ Inquired about course offerings with several recent OLLI grant recipients
- ✓ Formed an ad hoc Advisory Board
- ✓ Drafted a vision and mission statement for an OLLI at CSU Channel Islands with the ad hoc Advisory Board
- ✓ Presented the Institute proposal in conjunction with required documents included in the Appendix to the Senate Committee on Centers in preparation for recommendation to the Academic Senate as a Center of the University
- ✓ Tentatively determined the first series seminar offerings, working with faculty committed to be instructors
- ✓ Established the fee structure and determined to initiate a scholarship fund
- ✓ Created the budget for the first year
- ✓ Secured the President’s commitment to offering OLLI students access to campus amenities
- ✓ Designed the evaluation with the assistance of Psychology Department faculty

Indeed, the Advisory Board has taken on the planning with gusto—a good harbinger for future community involvement.

We understand that the Bernard Osher Foundation will announce the awards from this competition in January, and the plan shown in the timeline below reflects this start up date. A January 1 start date will allow the University to complete the public relations and outreach planning and mobilization, conduct the hiring process for the Coordinator position, finalize agreements with senior/emeritus faculty, and launch a full scale first seminar program in the summer of 2004, followed by a second session in the fall. This will give the program a strong start for the first full 3-session year (winter, spring, fall) in 2005.

Implementation timeline for January 2004 start-up:

<i>Month</i>	<i>Activities</i>
January-March	Advertise and hire coordinator; conduct needs analysis
	Contract with P.R. professional to assist with promotional brochure, newspaper insert
	Establish account for OLLI
	Confirm course offerings with instructors for summer series; complete contracts
	Draft the promotional brochure and newspaper insert
	Develop mailing lists
	Meet with Director of Development regarding setting up a "Friends" group and appropriate non-profit status. Add Assistant Director to the Friends group
	Create the formal Advisory Board from the ad hoc group
April	Finalize the promotional brochure and newspaper insert after review by Advisory Board
	Complete the protocols and systems procedures for enrollment
	Conduct outreach at senior communities, residences, and centers
	Mail the brochures
May	Print and distribute the newspaper insert (first week)
	Continue outreach at senior communities, residences, and centers
	Plan the open house with the Advisory Board and faculty
	Hold a faculty meeting to discuss purpose, appropriate pedagogy, lunch scheduling, etc.
	Develop the evaluation forms with the assistance of professors
	Hold open house (last week)
	Meet with Advisory Board to discuss incorporation of a "Friends" group
June	Initiate the first eight-week session
	Check in with instructors after first session to trouble-shoot issues
	Begin incorporation of "Friends" group initially to raise scholarship funds
	Survey participants and senior communities for potential future faculty
	Conduct first formative evaluation
July	Hold focus groups to identify interests for topic for next series
	Discuss potential topics with faculty and Advisory Board
	Complete incorporation of "Friends" and establish fiscal accountability
	Meet with "Friends" Board to determine scholarship parameters, selection criteria, etc.
	Draft "Friends" scholarship brochure for approval by "Friends" Board
August	Complete first eight-week session
	Initiate "Friends" scholarship fund solicitation with participants of first session
	Administer and analyze evaluation forms
	Conduct focus groups with selected summer series participants
	Finalize next session topics and instructors
	Mail brochures for fall program
	Finalize the promotional brochure and newspaper insert after review by Advisory Board

September	Initiate the fall eight-week session
	Check in with instructors after first session to trouble-shoot issues
	Begin incorporation of "Friends" group initially to raise scholarship funds
	Survey participants and senior communities for emeritus faculty
October	Hold focus groups to identify interests for topic for winter 2005 series
	Discuss potential topics with faculty and Advisory Board; make final decisions
	Finalize the promotional brochure and newspaper insert after review by Advisory Board
	Draft "Friends" scholarship brochure for approval by "Friends" Board
	Conduct quarterly formative evaluation
November	Conduct fall series evaluation, including assessment of "Friends" solicitation
	Meet with the Advisory Board to make program adjustments based on feedback
	Meet with "Friends" Board to make solicitation adjustments based on feedback
	Conduct outreach at senior communities, residences, and centers with Fall students
	Mail the winter series brochures (last week)
December	Print and distribute the winter series newspaper insert (first week)
	Plan the open house with the Advisory Board and faculty
	Hold a faculty meeting to discuss purpose, appropriate pedagogy, lunch scheduling, etc.
	Refine the evaluation forms to reflect changes made as a result of the evaluation process
	Select scholarship recipients
	Aggregate data; write and submit annual report

Commitment of CSU Channel Islands to lifelong learning students

OLLI students will enjoy the similar access to university facilities and resources as campus-enrolled students. This access will include the library, computer labs, student lounge, snack bar and restaurant, use of the campus shuttle buses from the Camarillo Park and Ride lot (which serves Amtrak and Metrolink from San Fernando Valley, Simi Valley and Moorpark) for a negotiated senior rate and all other campus facilities (as arranged). It also includes use of discount rate entry fees at sporting, music events, plays, film series, and presentations by guest speakers.

4. Financial information:

Fees

CSU Channel Islands has determined to use the fee structure currently set for Sonoma State, originally adapted by SSU from the Fromm Institute model. A fee of \$ 150 per session will allow the student to participate in up to four classes, for example coming to campus Monday through Thursday for the morning seminar and staying through lunch.

We recognize that, while the fees are very reasonable (with the assistance of the Bernard Osher Foundation), there are seniors for whom this amount would constitute a financial burden. Therefore, we plan to begin a student scholarship fund. Sonoma State University's model is very impressive, with the majority of the scholarship funding coming from the students themselves contributing amounts ranging from \$40 to \$5,000 this year. Over \$600 was additionally donated by their local community foundation.

Among the tasks in year one is the development of a "scholarship donation" brochure soliciting contributions for the scholarship fund in the amounts of \$75 (Scholarshare), \$150 (Scholarship), \$300 (Scholarpair), \$1,800 (Scholar dozen), and \$5,000 (Scholarclass). CSU Channel Islands will establish a

“Friends” organization in year one, with the initial purpose of accepting the scholarship donations and the ultimate purpose of helping fund the entire program.

Budget (income and expenses)

See the budget on the following page

5. Community involvement and contribution

Recruitment

The most basic community involvement comes through participation in OLLI seminars and activities. To ensure the broadest possible involvement—and the enrollment of at least 150 seniors in the first three series of seminars—CSU Channel Islands has designed a significant recruitment campaign that includes all of the following strategies:

✓ *Targeted mailing of brochures:* Using purchased mailing lists organized by address, the Institute staff will develop a mailing database for near-by senior communities (e.g., Leisure Village) and other neighborhoods with a high percentage of persons 50+. The first brochure will feature pictures borrowed from other projects along with information about the classes, enrollment procedures, the Friends, and the support of the Bernard Osher Foundation; the logo will be included.

✓ *Targeted placement of brochures:* Brochures will also be placed in key commercial/service locations frequented by seniors including senior community centers, libraries, bookstores, supermarkets, retail shopping malls, medical offices, and other places seniors frequent.

✓ *A newspaper insert:* Although relatively expensive, a newspaper insert has proven a very successful recruitment device for the Sonoma State University OLLI, and CSU Channel Islands plans to capitalize on the success they’ve experienced with this strategy. The first issue will be modeled on the Sonoma State version. After that, the end-of-course survey/evaluation and focus groups will help us adjust the presentation and format to be most effective.

✓ *Visits to senior communities, residences, and centers:* The project will develop a speaker’s bureau in the form of a team of one staff member and one OLLI participant who will make presentations to various senior groups (e.g., Leisure Village) and at senior communities, residences, and centers. The staff will initially create a presentation template for the speaker’s bureau, including showing the video and highlighting the topics in the up-coming series.

✓ *Regular PR campaign:* The Institute will conduct a regular PR campaign, including for every seminar series, two press releases—the primary release announcing the new seminars with enrollment information and a follow-up release reminding of the closing date for registration. Additionally, staff will arrange with the local newspaper, the Ventura County Star, to do a photo-shoot and story once during each seminar. Other press releases could feature the Friends, individuals, the scholarship story, special events, etc.

✓ *Development of the “Friends of OLLI at CSU Channel Islands:”* The Friends organization, discussed below, is another way to reach out into the community to expand recruitment and spread the word about the opportunities available through the Institute.

As discussed above, CSU Channel Islands plans two community groups to work with the OLLI: the Advisory Board for the program and a separate tax-exempt organization, “The Friends of OLLI at CSU Channel Islands.”

Advisory Board: The Advisory Board in year one will be chosen from the ad hoc advisory group that has met over the last several months.

Ad Hoc Board Members:

Virgil Adams, PhD, Assistant Professor of Psychology
 Harley Baker, PhD, Assistant Professor of Psychology
 Gary Berg, PhD, Director of Extended Education, CSU Channel Islands
 Rainer F. Buschmann, Ph.D, Assistant Professor of History
 Irina Costache, PhD, Associate Professor of Art History
 Hank Lacayo, Destino 2000 Executive Director, State President of the Congress of California Seniors
 Lillian Hawthorne, Emeritus, University of Southern California
 Colleen House, Director, Area Agency on Aging, County of Ventura
 Carol Howell, Director of Foster Care Education, Moorpark Community College
 Ken Jones, PhD, Emeritus, CSU Northridge
 Martin Kaplan, PhD, distinguished research professor, Emeritus, Northern Illinois University
 Joyce Kennedy, Emeritus, CSU Northridge
 Jacquelyn Kilpatrick, Associate Professor of English
 Tom McMillan, Emeritus, CSU Northridge
 Delores Velia Rains, Professor Emeritus, St. John's Seminary College
 Jack Reilly, Professor of Art
 Jane Rozanski, Chief Executive Officer, Camarillo Healthcare District
 Vicky Sharpe, PhD, Emeritus, CSU Northridge
 Barbara Thorpe, EdD, Associate Vice President, CSU Channel Islands

From the ranks of this 19-member group and others from the regional educational community, 10 Advisory Board members will be chosen—8 community members and 2 CSU Channel Islands representatives. The Board will then create its own operating procedures, including terms, member replacement protocols, leadership designations, etc. There is no intention to have this group incorporate as a non-profit entity.

The role of the Advisory Board is primarily to conduct the quarterly formative evaluations of the project; see the discussion of formative evaluations in section 6. The group also provides advice on

- ✓ Outreach and recruitment strategies,
- ✓ Outreach materials,
- ✓ Seminar topics for future series,
- ✓ Seminar pedagogy, and
- ✓ Future augmentations to the basic OLLI seminar program.

The Friends of OLLI at CSU Channel Islands: The Friends organization members will be drawn from those seniors who express an early interest in OLLI through the outreach activities and enrollment in the first seminar series. The staff will approach likely members, ascertain their interest, and conduct a meeting of these potential organizers in April. Staff will work with those interested in taking a leadership position and will draft the incorporation documents under in-kind attorney oversight. Members of the Friends Board will be appointed and replaced according to the By-Laws created by the organization.

The primary purpose of the Friends initially is to raise funds for scholarships and, later, to support the expansion of the program as a whole. CSU Channel Islands will assist the Friends from the Development Office, providing advice on drafting materials, targeting donors, and soliciting funds from local community foundations or corporations. OLLI will provide the Friends with their initial start-up materials, access to office machines/telephones, etc.

Clearly, the Friends will require the attention of several dedicated seniors who are ready to take on a new challenge in their lives. Although finding those individuals through the recruitment/outreach efforts will take extra time in the first year, the payoff will be substantial, as the Friends will provide for the on-going

and independent senior community leadership for OLLI as well as institutionalizing the founding tenet of access-for-all through the scholarship program.

6. Evaluation of the Osher Lifelong Learning Institute

Evaluation design: The evaluation of the OLLI is an inherent part of the program, and CSU Channel Islands will use both a formative and summative evaluation structure.

The formative evaluation will take place quarterly under the auspices of the Advisory Board and include all key staff. The purpose of the formative evaluation is to determine to what extent the Institute has completed the tasks set out in the workplan in a thorough and timely manner and to what extent the results were of high quality—and then to use that information to improve the program delivery in the next quarter. This cycle of continuous improvement will incorporate all of the following data sources:

✓ **Results from the end-of-course survey/evaluation:** Professors from the Psychology Department have already committed to assisting the Institute staff in creating a valid document to use as an end-of-course survey and evaluation instrument. This is the basic feedback tool the project will use, and it will include questions about recruitment/outreach, support, the seminar, the sense of the learning community, and the scholarship program.

✓ **Results from the focus groups:** To address issues raised by responses to the end-of-course survey/evaluation, the staff will form focus groups of participants to respond to carefully structured but open-ended questions about the particular issue. For example, if scores for support services were low for the registration process, a focus group would be initiated to discuss the precise problems and suggest remedies. Focus groups might also be used to address topics such as how to increase participation in the scholarship program or how to bolster enrollment of Hispanic elders, etc.

✓ **Informal feedback:** Informal feedback, such as comments made by the cable television station director about calls she received or discussion at a Friends meeting about parking problems, can be valuable in capitalizing on what's working and fixing what's not.

The formative evaluation is also pro-active. The Advisory Board looks forward to the up-coming quarter and works with staff to identify any potential future barriers to success. The group then generates a plan to address any identified potential problem areas.

The summative evaluation is completed once a year by the Advisory Board, written by staff, and submitted with the annual report to the Bernard Osher Foundation. The summative evaluation presents the full annual programmatic and fiscal data in relation to the projected number of enrollments projected and the initial budget projections. This process also reviews the activities conducted during the year that generated the results data. And, finally, the findings of the evaluation are transformed to action recommendations for the next year.

Use of evaluation data for continuous improvement. The formative evaluation is the front-line strategy for continuous improvement. Every quarter the Advisory Board reviews data to determine what's gone well and why, what hasn't met expectations and why, and what in the program or fiscal operations needs to be adjusted in the next quarter to improve performance. As a result of these discussions, staff makes the necessary programmatic or fiscal adjustments to generate improvement. The summative evaluation is used in the same way, but with the more formal structure of findings and recommendations.

7. Brief biographical background on program leadership

Gary A. Berg, Ph.D. is Director of Extended Education and Distance Learning at California State University Channel Islands. Dr. Berg has many years of experience working with adult learners and came

from Chapman University where he was Director of Extended Education and Summer Session. Formerly, he directed the continuing education division of the California School of Professional Psychology, the largest autonomous graduate school of psychology in the country, managing continuing education courses for mental health professionals. Previously, Dr. Berg also organized training programs for film and television directors at the Directors Guild of America. He began his career in higher education administration at UCLA Extension. Dr. Berg holds degrees in English Literature from UC Berkeley, a masters in Film Studies from San Francisco State University, a Masters in Fine Arts in Film/TV Production from UCLA, and a masters and doctorate in education from Claremont Graduate University. Dr. Berg has numerous publications to his credit including two books.

Barbara Thorpe is Associate Academic Vice President of CSU Channel Islands, the twenty-third and newest campus in the California State University system. Prior to her appointment with CSU Channel Islands, Dr. Thorpe chaired the largest online undergraduate nursing program in the California State University and the western United States, serving 2,500 adult learners. Dr. Thorpe holds a Doctor of Education from the University of San Francisco, a Masters of Public Health from the University of Tennessee, and a Masters of Science in Nursing from the California State University. She has taught and managed public higher educational programs at the University of Tennessee and the California State Universities at San Francisco and Dominguez Hills. Dr. Thorpe's funded research and community service has focused on community needs assessment, planning and design, and implementation of integrated K-12 health and community centers in under-served communities. Dr. Thorpe recently chaired the Ventura County Public Health Advisory Board and co-chaired the Ventura County School-to-Career Executive Board.

8. General background on CSU Channel Islands

CSU Channel Islands, Ventura County's first four-year public university, opened in 2002 for upper-division students. The newest and 23rd campus in the California State University system welcomed its first class of freshmen in fall 2003. Thousands have applied to be among the first students on the campus, with its historic, Mission-style architecture on 670 acres nestled among the hills and farms of Camarillo.

As a new and growing campus, CSU Channel Islands is in a unique position for a public university. While the University can build on the strengths of the CSU system—the largest public-education system in the nation—it is also able to focus on individual students, many of whom see themselves as their professors do, as pioneers blazing a trail. “Student-centered learning” embodies a University philosophy that emphasizes meeting the needs of each student. The multidisciplinary approach includes mentoring and experience-based learning.

The campus rests at the foot of the Santa Monica Mountains, minutes from the Pacific Ocean and halfway between Santa Barbara and Los Angeles. The main entrance winds through farmland, orchards, and rocky foothills leading to dramatic Spanish-revival architecture, built in the 1930s as part of FDR's Works Project Administration program. The sprawling structures with their red-tiled roofs reflect California's past, from the landmark Bell Tower that pays homage to a nearby mission to the Catalina and Malibu tile work on the fountains that decorate many of the 40 courtyards.

Built in the early part of the 20th century as the former Camarillo State Hospital, the sprawling Spanish revival buildings, cloistered hallways, Bell Tower, tiled fountains, open space, and many courtyards have been renovated to house our new state-of-the-art 21st century University. Engineers at CSU Channel Islands recently won a “Project of the Year” award for successfully turning what was originally a state hospital into a “beautiful university campus.” Construction and renovation is ongoing. Work on the John

Spoor Broome Library and Media Center, designed to be a campus landmark by award-winning architect Norman Foster, began this summer and should be finished in March.

Beginning just this fall, CSU Channel Islands is offering 10 majors to the first cadre of freshmen— Art, Biology, Business and Economics, Computer Science, English, Environmental Science and Resource Management, History, Liberal Studies, Mathematics, and Psychology in addition to a teaching-credential program. An ever-expanding, world-class faculty will teach these courses. More than 1,500 people applied for 25 faculty positions expected to be added for fall 2003. Those chosen will join the 30 faculty members who taught the inaugural classes at the University.

OLLI at CSUCI will be on the ground floor of a new, state-of-the-art university and will become an integral and institutionalized mainstay of community education in Ventura County.

Appendices

A. Budget

B. Biographical information on leadership of program:

Gary Berg

Barbara Thorpe

Martin F. Kaplan (tentative program coordinator)

Ad Hoc Advisory Board Members:

Virgil Adams

Harley Baker

Rainer Buschmann

Diana Casey

Irina Costache

Neva Kilpatrick

Dolores Rains

Jack Reilly

Vicki Sharpe

C. Ventura County Area Agency on Aging: Area Plan Update 2003-04

D. Ventura County Area Agency on Aging: Family Caregiver Support Program