

ROAD SCHOLAR[®]

Institute Network

Member Survey 2014



Road Scholar Institute Network

Member Survey 2014

The Road Scholar Institute Network

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INTRODUCTION

Genesis of the Survey

This survey was born in discussions among senior staff from Road Scholar, the Road Scholar Institute Network and a former member of Road Scholar's Board of Directors, Ms. K. Patricia Cross, professor emeritus at the University of California, Berkeley. Ms. Cross had made an offer of financial support for an original research project to be conducted by Road Scholar. Several ideas were discussed but, given Ms. Cross's expertise in and long association with the field of adult education, her personal involvement with the Osher Lifelong Learning Institute (OLLI) at UC Berkeley, and Road Scholar's history of involvement in and contributions to the Lifelong Learning Institute (LLI) movement, a survey of LLIs in retrospect seems like an inevitable outcome. Ms. Cross gave Road Scholar's research team a free hand in designing and conducting the research but had one binding stipulation — that the results of the research be truly valuable and, more importantly, useful to LLI leadership.

A Brief History of the LLI Movement

Historical Roots: Non-vocational adult learning has deep historical roots in the United States. The Lyceum Movement started in 1826 and quickly expanded to hundreds of informal organizations that gave young men — at a time when few graduated from college or even high school — an opportunity for education and exposure to ideas, sometimes from prominent lecturers and thinkers like Ralph Waldo Emerson and Henry David Thoreau. In a rapidly expanding nation and economy, lyceums were a venue for establishing connections and an engine for self-improvement and upward mobility for both speaker and audience. A 28-year-old Abraham Lincoln, for example, addressed the Young Men's Lyceum of Springfield, Ill., on January 28, 1838 on the topic of "The Perpetuation of our Political Institutions."

The Chautauqua Institution, founded in 1874 to provide continuing education to Sunday-school teachers, quickly expanded its purpose to offering college-level learning in a relaxed, lakeside setting in western New

York to both men and women. Local or traveling variations of Chautauqua rapidly proliferated, combining learning and leisure — before that available only to wealthy Americans able to afford to travel to Europe for the Grand Tour — to a rapidly growing American middle class.

The New School for Social Research: The modern lifelong-learning movement, focused on learning in retirement, began in the early 1960s at New York City’s New School for Social Research. A group of retired school teachers, unhappy with the courses offered by their union, approached New School administrators with the idea of offering more academically rigorous courses. The New School readily agreed to a three-year trial, provided the courses were open to all, and The Institute for Retired Professionals (IRP) was born. Four hundred members were chosen from 3,000 applicants; for a \$45 annual membership IRP members could enroll in any New School daytime courses. The real innovation of the program, however, was the series of weekly seminars organized and taught by IRP members themselves.¹

Other Pioneer LLIs: Other LLIs followed in the 1970s, including the Institute for Lifetime Learning at Cowley County Community College (Kansas), the Institute for Learning in Retirement at Syracuse University in 1975², and the Duke Institute for Learning in Retirement, the Harvard Institute for Learning in Retirement, the Institute for Retired Professionals and Executives at Brooklyn College, and the Personal Enrichment in Retirement (PEIR) Program at Hofstra University, all in 1977, and Emory’s Senior University in Atlanta, in 1979.³ An additional 34 LLIs were founded in the 1980s.

The Elderhostel Institute Network: Elderhostel (later, Road Scholar) was founded in 1975. In a history of Elderhostel published in 1993, author Eugene Mills, former president of the University of New Hampshire, wrote that

As Elderhostel and the Institute movement developed, it was obvious to all observers that there was substantial compatibility in fundamental assumptions, values, goals, and clientele of the two programs. Both programs reject the view that aging is a process of failing energy and value, but rather affirm the continuing promise and dignity of older people. Both programs depend on the active, personal involvement of participants. Both programs assume that learning capacity does not decrease as years increase, but that in fact learning is a conducive means of self-fulfillment for elders.

However, Elderhostel and the Institutes did not develop at an equal pace. By the mid-1980s,



1 “The Story of Elderhostel,” Eugene S. Mills, University Press of New England, 1993, p. 163

2 “The Story of Elderhostel,” Eugene S. Mills, University Press of New England, 1993, p. 163

3 “2000 Directory of affiliated Institutes for Learning in Retirement,” Elderhostel Institute Network, 2000

Elderhostel was growing at an astonishing rate of 20 to 30 percent per year, while the Institute program was expanding much more slowly. Furthermore, Elderhostel had established a balance between decentralized programming and a highly centralized national headquarters, but the Institute movement had no real center.

Leaders of various Institute programs had for a number of years sought a national mechanism to coordinate their efforts. The administration and Board of Directors of Elderhostel, equally aware of the programs' potential for mutual benefit, engaged in informal discussions with Institute officials. Finally, on June 12 and 13, 1986, the leaders convened a more formal meeting to consider "the desirability and feasibility of having Elderhostel serve as a *national coordinating organization* for the Institute Movement."⁴

As a result, the Elderhostel Institute Network (EIN) was formally organized on October 21, 1987. Over the next year an Institute Advisory Committee was recruited, an Office of Institute Support and Development was created and a director was hired to lead it and, early in 1989, the first issue of the EIN newsletter, "Network News," was published and distributed.



The 90s, a Decade of Growth: With consultation and advice from the EIN's Office of Institute Support and Development, the years 1990-1999 saw stratospheric growth, with 199 LLIs founded in that 10-year period. In 1993 alone, 32 LLIs got their start. By the end of the decade there were approximately 300 LLIs across the United States and Canada, 252 of which had opted to become affiliates of the Elderhostel Institute Network.

The costs of running the EIN and its Office of Institute Support and Development with four full-time staff were defrayed by membership dues, newsletter subscription fees and meetings and conference revenue, but the goal of closing the deficit through corporate or foundation funding was never realized. (An American Express grant of \$100,000 received in 1997 was an exception.) Elderhostel continued to subsidize EIN; in the five-year period 1994-1998, for example, that subsidy — net of the American Express grant — totaled \$958,000. This situation was untenable for a not-for-profit organization and several alternatives were explored. A survey of LLIs indicated intense aversion to an increase in dues as a way to turn EIN into a break-even operation; instead, dues were eliminated, staff was cut back initially to one full-time position, and EIN became a network for sharing ideas and best practices through an e-newsletter and a website rather than an office managing regional conferences and actively working with local groups to start new LLIs.

4 "The Story of Elderhostel," Eugene S. Mills, University Press of New England, 1993, p. 167

After 1999/Osher Lifelong Learning Institutes: One of the most significant developments in the LLI movement after 1999 was the involvement of the Bernard Osher Foundation in a significant effort to facilitate the growth and long-term viability of more than 100 LLIs across the United States. Bernard and Barbro Osher had a longstanding interest in lifelong learning, and their Foundation had begun providing financial support for the Fromm Institute in San Francisco in 1984.⁵ According to the Osher Foundation website, “In the fall of 2000, the Foundation began to consider programs targeted toward more mature students, not necessarily well-served by the standard continuing education curriculum. Courses in such programs attract students of all ages eager to accumulate units to complete degree or to acquire life skills. By contrast, the interest of older adults, many of whom are at retirement age, is in learning for the joy of learning — without examinations or grades.”



Beginning in 2001, the first two endowment grants were given to the University of Southern Maine and Sonoma State University in California. Satisfied with the progress the grants enabled these LLIs to achieve, the Foundation entered the lifelong-learning field in a “significant fashion,” sending Requests for Proposals to LLIs based at California State University or University of California campuses. Initial grants of \$100,000 enabled selected LLIs to focus on growing membership, and successful LLIs became eligible for endowment grants of \$1 million or more to supporting ongoing operations. The common thread of Osher-supported Institutes is “Non-credit educational programs specifically developed for seasoned adults who are aged 50 and older; university connection and university support; robust volunteer leadership and sound organizational structure; and a diverse repertoire of intellectually stimulating courses.” Grantee Institutions also agreed to change their name to “Osher Lifelong Learning Institute at the University of X.” Looking toward the future when the Osher Foundation would “spend down” its endowment, and to ensure there would continue to be “‘connective tissue’ between and among the growing number of Osher Institutes,”⁶ the Foundation in 2004 established a National Resource Center based at the University of Southern Maine. Among other services, the NRC manages OLLI National Conferences every 18 months.

Currently the Osher Foundation supports 117 LLIs in the United States, with at least one “OLLI” in each state and the District of Columbia. In the years since 1999 many new LLIs have also been founded. The Road Scholar Institute Network (so re-named after Elderhostel changed its program name to Road Scholar in 2009) now comprises 420 members, including 107 Osher Lifelong Learning Institutes.

5 “Staying the Course: Thirty-Five Years of Osher Philanthropy,” Mary Bitterman, p. 83

6 “Staying the Course: Thirty-Five Years of Osher Philanthropy,” Mary Bitterman, p. 91

About K. Patricia Cross

K. Patricia Cross is Professor of Higher Education, Emerita at the University of California at Berkeley. Cross has had a distinguished career as a university administrator (Assistant Dean of Women, University of Illinois and Dean of Students at Cornell University), researcher (Distinguished Research Scientist at Educational Testing Service and Research Educator at The Center for Research and Development in Higher Education, University of California, Berkeley), and teacher (Professor and Chair of the Department of Administration, Planning, and Social Policy at the Harvard Graduate School of Education and Professor of Higher Education (David Pierpont Gardner Endowed Chair, University of California, Berkeley).



The author of eight books and more than 200 articles, monographs and chapters, Cross has been recognized for her scholarship by election to the National Academy of Education, receipt of the E.F. Lindquist Award from the American Educational Research Association, the Sidney Suslow Award from the Association for Institutional Research, and the Howard Bowen Distinguished Career Award from the Association for the Study of Higher Education.

She was voted one of “the most influential voices” in higher education in a *Change Magazine* poll in 1975, and when the poll was repeated in 1998, she was again selected as a national leader. Elected Chair of the Board of the American Association of Higher Education twice (1975 and 1989), she has received many awards for her leadership in education, among them the Leadership award from the American Association of Community and Junior colleges, the Outstanding Service Award from the Coalition of Adult Education Organizations, the award for outstanding contributions to the improvement of instruction from the National Council of Instructional Administrators, and the Academic Leadership Award from the Council of Independent Colleges. She has been awarded 15 honorary degrees and is listed in *Who’s Who in the World*, *Who’s Who in America*, *International Who’s Who of Women*, and *Who’s Who in American Education*.

She is a member of the National Academy of Education and twice served as chair of the Board for the American Association of Higher Education. She served as a board member of the Carnegie Foundation for the Advancement of Teaching, the Berkeley Public Library, and Elderhostel (now known as Road Scholar).

Cross has lectured on American higher education widely in the United States and abroad in England, France, Denmark, Germany, the Soviet Union, Japan, Australia, New Zealand, Hong Kong, and Holland. Her interests are primarily in changing college student populations, adult learning, and the improvement of teaching and learning in higher education.

Cross received her bachelor’s degree in mathematics from Illinois State University and master’s and Ph.D. degrees in social psychology from the University of Illinois.

METHODOLOGY

Research Team

The research was directed by Peter Spiers, Senior Vice President for Strategic Outreach and author of “Master Class: Living Longer, Stronger, and Happier” (Center Street/Hachette, 2012). The research team included Nancy Merz Nordstrom, Program Manager of the Road Scholar Institute Network, and members of the Road Scholar marketing department, who contributed proofreading, mailing, and design expertise.

Survey Process

Mr. Spiers drafted the survey, and Ms. Merz Nordstrom made substantive improvements to that draft, in August 2013. An informal advisory panel of LLI leaders then reviewed the draft survey for clarity and thoroughness and, most importantly, to confirm that the survey results would be useful to them in their leadership roles. The advisory panel included Jo Brownlie, Osher Lifelong Learning Institute, Saginaw Valley State University, Mich.; Beverlee Koutny, Chemeketa Center for Learning in Retirement, Ore.; Susan Hoffman, Osher Lifelong Learning Institute, University of California, Berkeley, Calif.; Tammy Lewis, Institute for Learning in Retirement, Rock Valley College, Ill. ; Ann Maher, Mohawk Valley Institute for Learning in Retirement, N.Y.; Beverly Stevens, The Second Half: LLI, University of Massachusetts Dartmouth, Mass.; and Richard Tucker, Learning Institute for Elders, University of Central Fla. Their suggestions were numerous and invaluable.

The survey was administered using the website SurveyMonkey, and emailed to the approximately 410 LLIs who are members of the Road Scholar Institute Network, on October 17, 2013. “Bouncebacks” resulting from bad or non-working email addresses were investigated, corrected, and re-mailed. Several reminder emails were sent, and in December, 2013 reminder telephone calls were made, to non-responding LLIs. The survey was closed on January 3, 2014 with 187 total responses. Five LLIs submitted duplicate surveys and the earlier sub-

mitted of each duplicate pairs was deleted from the analysis. Another 10 incomplete surveys were also deleted from the analysis. This analysis was based on 172 submitted and unduplicated surveys, from three Canadian provinces and 41 states.

Mr. Spiers led the ensuing analysis of the results and is the principal author of this report.

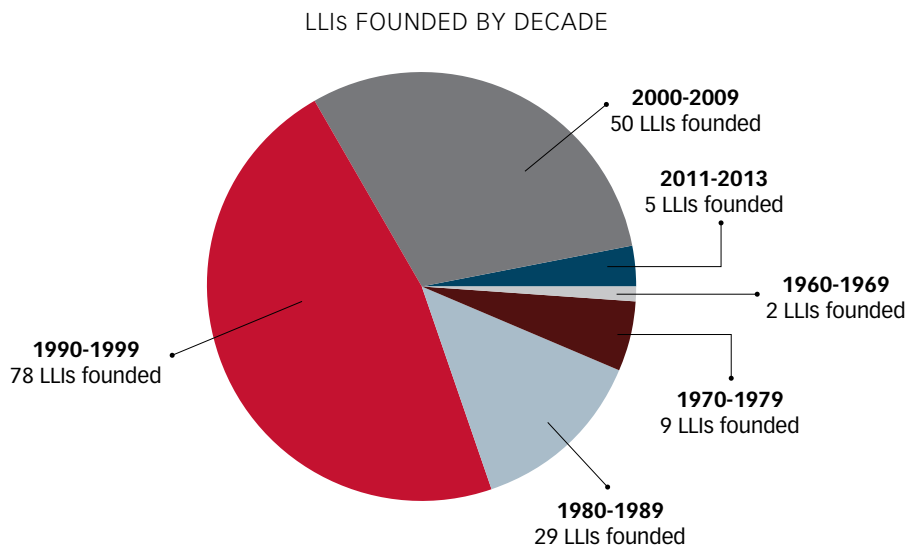
SURVEY RESULTS AND ANALYSIS

The survey — and this report — is divided into six sections: Institute Census, Membership, Administration, Conferences, Curriculum, and Other Comments. A copy of the survey is included in Appendix I of this report.

Institute Census

Responding LLIs: A complete list of the 172 LLIs that submitted complete or substantially complete surveys is listed, by state and Canadian province, in Appendix II.

Year Founded: The busiest decade for founding LLIs in the historical record (see above) — and in our survey results — was the 1990s (1990-1999). Seventy-eight LLIs — 47.0% of those reporting a founding year — were founded in the 1990s, and another 50 (30.1%) were founded in the years 2000-2009. The breakdown by decade is:

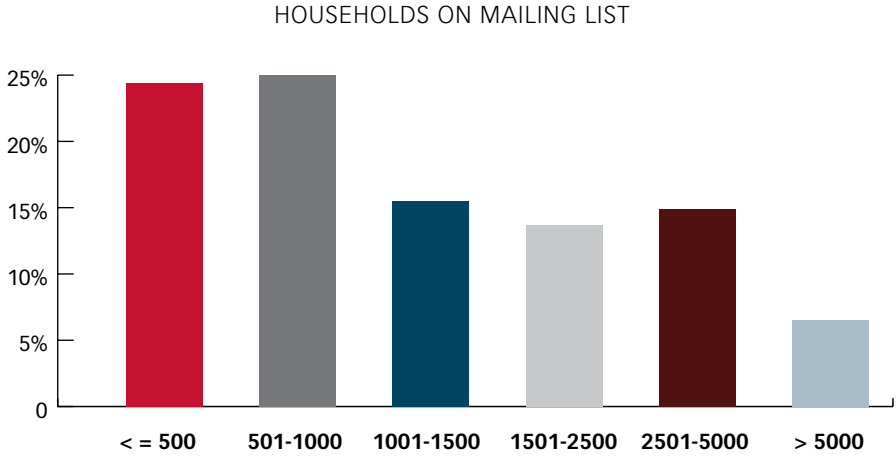


OLLI and LLIs: Just over a quarter (26.6%) of survey respondents are Osher Lifelong Learning Institutes (OLLI). This percentage is consistent with the representation of OLLIs in the Road Scholar Institute Network, and these results, coupled with the distribution of founding years, suggest that the survey respondents are representative of all LLIs.

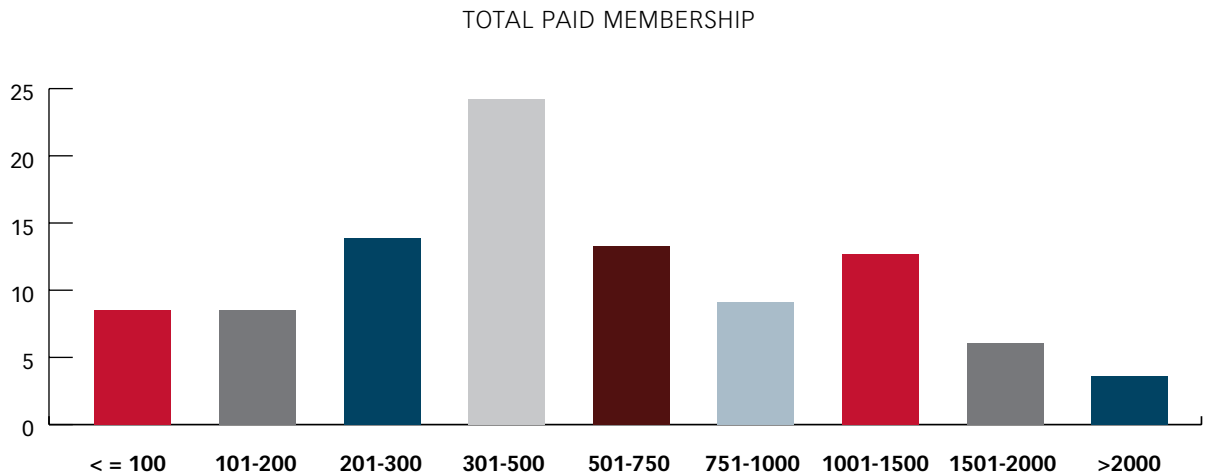
Affiliations: Eighteen respondents (11.0%) said they were not affiliated with a college or university.

Membership

Mailing List: One quarter (25.0%) of responding LLIs maintain a mailing list of active, lapsed, and prospective members in the 501 to 1,000 range, closely followed by another quarter (24.4%) with mailings lists of 500 names or fewer. Nearly 15% have mailing lists in the 2,501 to 5,000 name range, and 6.5% have mailing lists of 5,001 or more.



Total Paid Membership: Just under one quarter (24.2%) of responding LLIs have 301 to 500 paid members, defined as individuals who have paid a membership fee, a course fee, or made a financial donation within the last 12 months. Large LLIs — those with more than 1,000 paid members — account for 22.4% of respondents. Six LLIs, 3.6% of respondents, report paid memberships of more than 2,000.



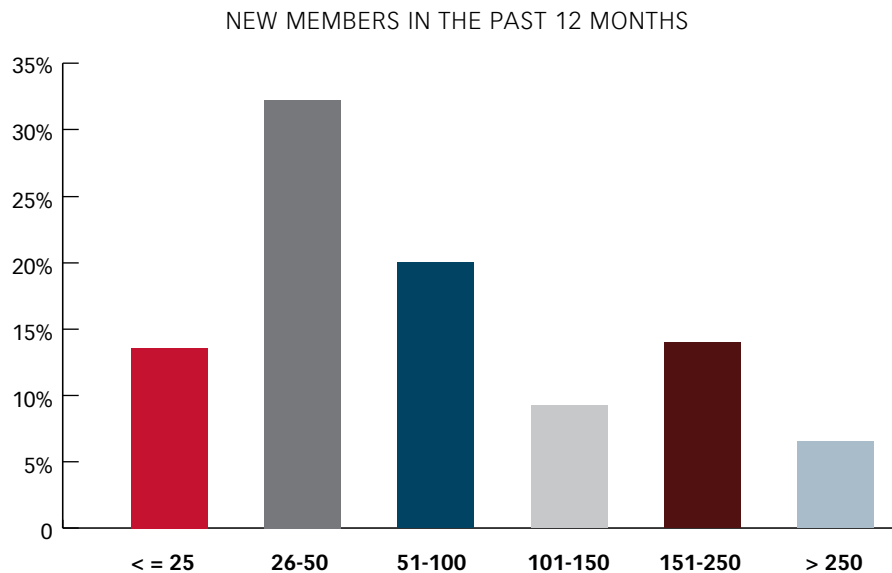
Age of Members: People in their 70s are the most highly represented age cohort in LLIs, typically accounting for 31%-40% of membership. Somewhat more members are younger than that than older — 21%-30% of members are in their 60s, while only 11%-20% are in their 80s. On either end of the spectrum, 1%-10% of members are either in their 50s or their 90s, and it is very uncommon to find members older or younger than that.

Membership Tenure: Most LLI members have been members for either 3-5 or 6-9 years, with each tenure band representing 21%-30% of total membership. Members with tenure of 1-2 years or 10 or more years each represent 11%-20% of total membership, and new members — those with members of a year or less — represent 1%-10% of all members in a typical LLI.



New Members: Just under a third (32.1%) of LLIs welcomed 26 to 50 new paid members in the last 12 months. Slightly fewer than that (28.9%) ushered in 51-150 members, and 25.7% brought in 151 or more members.

Correlating the new membership pattern with total membership suggests a replacement rate of about 10%, or slightly less, for the typical LLI — probably an insufficient rate to achieve growth. (For an imperfect comparison, note that about 20% of Road Scholar participants each year are “first timers.”)



Age of New Members: Most new LLI members (60%-80%) are between the ages of 60 and 79, with somewhat more in their 60s than in their 70s. Very few are younger or older than that, with 1%-10% either in their 50s or 90s.

Distance from Home to LLI: Most LLI members live 10 or fewer miles from their LLI, while practically none come from more than 25 miles away.

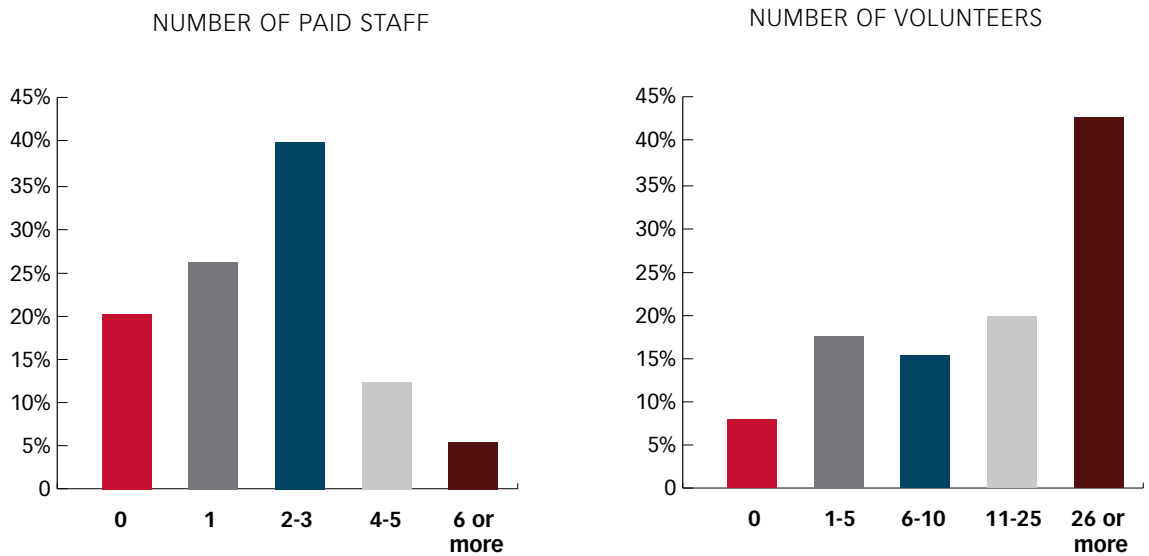
Sources of New Members: Word-of-mouth brings in the most new members; 85.5% of LLIs selected “referrals from current members” as the number one way new members come to them. Free media (i.e. PR) was selected by 44.7% of LLIs as the second-most effective marketing method and by another 40.1% as the third-most effective method. While some LLIs have had success with direct mailings, other paid methods such as advertising haven’t been found effective.

Administration

Written bylaws: Out of 167 LLI's answering this question, 134 (82.7%) reported that they have written bylaws.

Full- or part-time paid staff: The most common number of full- or part-time paid staff is 2-3, reported by 39.2% of respondents. Just under 20% report no paid staff, while 4.82% (8 respondents) have six or more paid staff.

Active volunteers: We asked "How many volunteers (giving on average at least one hour per week when classes are in session) support your LLI?" The most common response, given by 42.51% of respondents, was "26 or more."⁷ The distribution of the other responses is as follows:



7 The fact that the choice at the end of the range ("26 or more") was the most common response indicates that the scale for this question was not properly designed. This will be corrected in subsequent surveys.

Key paid and volunteer positions: The most common paid position at LLIs is “Administrative Assistant,” reported by 57.9% of respondents, followed by “Executive Director,” reported by 50.6% of respondents. The most common volunteer leadership positions are in key functional areas: 61.6% report having a volunteer “Membership Coordinator,” 49.1% report having a volunteer “Marketing/Communications Coordinator,” and 49.4% report having a volunteer “Program Coordinator.”

	Paid	Unpaid	Did not report	Total reporting
Executive Director	50.6%	14.8%	34.6%	65.4%
Administrative Assistant	57.9%	8.2%	33.9%	66.1%
Classroom Coordinator	13.1%	44.4%	42.5%	57.5%
Development Officer	5.7%	21.7%	72.6%	27.4%
Marketing/Communications Coordinator	11.9%	49.1%	39.0%	61.0%
Membership Coordinator	8.8%	61.6%	29.6%	70.4%
Program Coordinator	31.2%	49.4%	19.4%	80.6%
Travel Programs Coordinator	5.9%	36.6%	57.5%	42.5%

Role of Executive Director: In this open-ended question, respondents were asked to “describe the role of your LLI’s Executive Director or equivalent.” The responses were coded and 20 responsibilities or job description elements were identified. These responsibilities, and the number and percentage of respondents who mentioned this as part of the Executive Director or equivalent position, are summarized in the following chart:

Responsibility	Number	Percent
Creating or managing budgets	37	27.0%
Chairing board or executive committee meetings	24	17.4%
Chairing membership meetings	10	7.3%
Curriculum development	46	33.6%
Day-to-day administration	39	28.5%
External relations	30	21.9%
Fundraising	16	11.7%
Liaison with host institution	41	29.9%
Managing paid staff	31	22.6%
Managing volunteer staff	25	18.2%
Membership development	19	13.9%
Operations (e.g. mailing list maintenance, registration)	20	14.6%
Overseeing other committee meetings	31	22.6%
PR/Media	11	8.0%
Publications/Marketing	33	24.1%
Scheduling	13	9.5%
Sourcing instructors	6	4.4%
Space acquisition	13	9.5%
Strategy/policy development	19	13.9%
Travel program management	8	5.9%

These functions cluster in several distinct areas, broadly defined as follows:

Leadership: chairing board or executive committee meetings; chairing membership committee meetings; overseeing other committee meetings; strategy/policy development; liaison with host institution; external relations; fundraising.

Administration: creating or managing budgets; day-to-day administration; operations (e.g. registration); managing paid staff; managing volunteers; scheduling; space acquisition.

Communications: membership development; publications/marketing.

Program Development: curriculum development; sourcing instructors; travel program management.

Committees: The most common standing committee is Curriculum, with 84.0% of LLIs indicating that they have a committee for this purpose. Second and third, with 64.2% and 55.6% respectively, are Membership and Finance/Budget.

Committee	Percent
Bylaws	18.5%
Curriculum	84.0%
Development/Fundraising	30.2%
Finance/Budget	55.6%
Long-Range Planning	31.5%
Membership	64.2%
Public Relations	45.7%
Scholarships	14.8%
Special Events	46.9%
Travel	34.0%
Volunteer Development	27.2%

Other committees frequently mentioned in the “Other” open-ended choice in this question include groups that oversee some combination of technology, automation, and audio-visual services, others that are dedicated to

hospitality and socializing, and executive groups typically called steering committees.

Number of Program Venues: The plurality (27.6%) offer programs in one location only, while one out of six (16.6%) offers programs in 10 or more locations.

Number of Venues	
1	27.6%
2	16.6%
3	12.3%
4	10.4%
5	6.7%
6	3.1%
7	2.5%
8	4.3%
9	0.0%
10 or more	16.6%

Space Issues: We asked an open-ended question as follows: “Please use the space below to describe any specific challenges you have, or creative solutions you have reached, regarding space acquisition, utilization, or parking.”

A selection of representative and unusual comments, and creative solutions, follows.

Some LLIs have been forced to limit membership because of space issues.

- “We often have more members wishing to take a course than seats available. We have instituted a lottery system to assure fair access to desired classes.”
- “Our program is very popular and we would like to expand but parking is such a big problem that we may have to curtail enrollment.”
- “Space continues to be our greatest challenge because of the number of courses we offer, our large membership, and declining availability of parking at our primary facility on campus. We have taken three steps to address this issue. One, we have added an afternoon at our primary off-campus facility,

which affords us the potential for another 12 courses per term. Second, we have made the strategic decision not to allow the curriculum to expand at this time, which would put additional burden on our already heavily scheduled classrooms. Finally, we have created a long- and short-term space committee to seek additional space in the area and to study the feasibility of building/acquiring a new facility.”

Other LLIs have strong relations with their host institution, have been able to muster the money and power to create a permanent on-campus solution, or are “managing.”

- “We are on a small campus with supportive administration.”
- “[Our LLI] raised awareness and money, which spurred the University’s Trustees on to build a 23,000-square-foot Continuing Education Building, which our members raised \$3.8 million of the \$6.4 million needed to build it.”
- “The college provides space for our program, and while it is true that each move has been into more attractive/comprehensive space, the organization has been relocated on campus five or six times in 16 years. Another move is under discussion; a goal this year is to be able to establish a named, permanent space on campus. We recognize that this will depend on increasing our financial stability in order to position ourselves to support the college financially in ways that have not previously been done. Increasing our scholarship program for students is one example.”
- “We have previously been bumped by the academic departments but a number of complaints and better communication has helped minimize this.”
- “Until 2013 we met at the University main campus in a dedicated room for almost 20 years. We were outgrowing the room and at some popular lectures we had to turn members away and parking was an issue. In 2013 they eliminated the building our classroom was located in. The University gave us a large modern room [in another location] about seven miles from the main campus. It is equipped [with] new table/desk and chairs, and audio visual equipment, and the location has ample parking. Our membership turnover for 2013 has been about the same as previous years, although we lost some older members, we gained younger members that live closer to the new location.”
- “Teach[ing] my volunteers to be more independent with trouble shooting AV challenges is something we are working on.”

Others are finding it more effective to diversify their space strategy in a variety of creative, off-campus locations.

- “We are in the process of using other locations to offer classes. Through a University Consortium

with the major four universities in our area, we will have access to two campuses outside of the city to offer Lifelong Learning classes. We are also exploring the possible opportunity to offer classes at two retirement communities in other areas of the region.”

- “We designed and purchased small light-weight signs that would be taken to off-site locations and put into ground to direct members/students to locations off site. We partner with a local hospital conducting free community lectures once a month at their location. They provide the location and speaker and we provide the students. We use it as part of a membership drive. We partner with a local State Forest and have nature classes at their location that are open to the public as well as our members. Community Partnerships are critical.”
- “We have no designated space, so we have been partnering with community businesses and resources (library, rec center, coffee shop). This addresses parking, public rooms and access, as well as outreach and benefit to community.”
- “Big problem with venues in [our city] — every church or other organization wants to make a lot of money on their rooms.”
- “Although satellite campuses are a possibility, we have found the experience at these locations to be less than ideal and maybe even damaging to our brand, due to our lack of hands-on control on a day-to-day basis.”
- “Space is difficult!!!! We rent from churches, community centers, and other low-cost venues. We typically pay no more than \$30/meeting for space.”
- “Our campus is perceived in the community as difficult to get to, hard to find your way around, and impossible to park in. We are in an area with minimal public transportation. Our college does not have access to classrooms, and our campus is notoriously overcrowded. Our solutions: We partner with as many community organizations as we can, often offering reduced/free access to our courses and programs in trade for classroom space. Museum docents might take our courses at no cost; or we will waive our membership requirement for members of the partnering organization. We partner with three CCRCs, who pay us a negotiated fee for providing programs at their facilities. We rent classroom space at a local church.”

Parking continues to be a challenge for many, though some have found or negotiated short- or long-term solutions.

- “Our office space (on campus) is a continuing challenge. Ours is too small and parking is imaginary.”
- “Parking is most available on Fridays, so we fill in Fridays with classes as best we can ...”
- “PARKING!! Trying to compete with 35,000 students on the ... campus for lot parking. We also have just been informed of a restriction of volunteer parking permits issued by the campus and are

now finding we must spend some earnings to buy parking passes for volunteers. We are also at the mercy of other departments for room usage on campus and must remain flexible about space.”

- “Members are afforded upgraded parking similar to faculty/staff.”
- “We have negotiated a single parking permit arrangement with the college, allowing Institute students to purchase a reduced rate permit for the term, allowing them to park in any of the student lots for a flat rate for the whole term.”

Finally, technology is a solution for space issues for some.

- “We have been offering courses via video conferences since 2005, which help to alleviate the space issues. We also offer video-on-demand by taping some of the courses and upload video on our website that provides an opportunity for members who happen to miss classes due to health and personal problems. We have almost 100 courses that people can watch at their leisure.”
- “We use technology to Skype (live) our popular classes into second classrooms.”

Conferences

Interest: Ninety-two percent of survey respondents indicated interest in attending a regional LLI conference “provided it was at a reasonable cost and at a convenient time.”

Preferred Conference Topics: The biggest draw of LLI conferences is the opportunity to network with peers from other LLIs, something 71.8% of respondents are “very interested” in. After that, the five next preferred conference topics are “membership development” (65.3%), “curriculum/program development” (52.7%), “fundraising” (49.6%), “market research” (43.1%) and “volunteer development” (42.7%).

	Very Interested	Somewhat Interested	Somewhat Uninterested	Very Uninterested
Networking with representatives from other LLIs	71.8%	24.6%	2.8%	0.7%
Touring host LLI facilities	27.7%	44.7%	20.6%	7.1%
Membership development	65.3%	24.3%	6.9%	3.5%
Fundraising	49.6%	28.5%	7.3%	14.6%
Curriculum/program development	52.7%	30.3%	0.7%	1.4%
Volunteer development	42.7%	34.3%	11.0%	2.1%
Financial management	25.6%	46.0%	20.4%	8.0%
Host institution relations	26.5%	36.8%	27.9%	8.8%
Space acquisition and utilization	32.6%	34.1%	18.8%	14.5%
Market research	43.1%	33.6%	14.6%	8.8%

In an open-ended question, we asked about other conference topics of interest. One consistent theme was an interest in technological issues. Comments included:

- “Using the Internet as the primary vehicle for communication with our members. Computerized registrations programs that would be adaptable for use on the Internet.”
- “Using technology, lectures on online, and MOOCs. How LLI members can participate and benefit from a lecture being taught at another location without having to drive or travel to that location.”
- “How new technology can be used to make office operations easier, smoother and less cumbersome. We are constantly tweaking our systems to be more efficient and effective.”
- “Better automation of membership data and enrollment.”

- “Managing print (e.g., Directory) and online privacy issues.”
- “Software to support signing up and tracking members and course applications.”

Programs and Curriculum

Programming Months: The busiest month for programming is October, with 98.0% of LLIs scheduling programming that month; the slowest month — not surprisingly — is August, with only 37.0% of LLIs offering programming then.



Programming Months	
January	62.3%
February	79.9%
March	91.2%
April	94.2%
May	85.7%
June	54.5%
July	44.2%
August	37.0%
September	87.7%
October	98.0%
November	90.3%
December	50.0%

Multi-Week Classes Offered in 2013: Respectively, 19.6% and 18.4% of LLIs offered either 11-25 or 26-50 multi-week classes in 2013. One in 10 LLIs offered more than 200 multi-week classes in 2013.

Multi-week Programs Offered	
0-5	8.2%
6-10	3.8%
11-25	20.1%
26-50	18.2%
51-75	13.8%
76-100	10.1%
101-150	9.4%
151-200	5.7%
201 or more	10.7%

Intersession Programming: Slightly more than half (52.7%) offered “intersession” programming, defined as “programming between regular semesters, often comprising shorter classes, lectures, and special events.”

Instructor Mix: The typical background for an LLI course instructor is an LLI member who is not active or retired college or university faculty; nearly 20% of LLIs report that rank-and-file members account for more than half of their instructor base. Otherwise, instructor background appears to be fairly evenly split between active college or university faculty, retired college or university faculty, and individuals from the surrounding community who are not LLI members.

	Instructor Background						
	0	1-10%	11-20%	21-30%	31-40%	41-50%	51% or more
Active college or university faculty	14.6%	41.4%	15.9%	11.5%	5.1%	3.2%	8.3%
Retired college or university faculty	5.1%	35.4%	17.1%	12.7%	18.3%	8.2%	3.2%
Individuals from your community who are not LLI members (e.g., a lawyer teaching a course on “Justice”)	6.3%	23.4%	23.4%	20.2%	9.5%	7.6%	9.5%
LLI members who are not active or retired college or university faculty	5.2%	22.1%	9.8%	17.5%	14.9%	11.0%	19.5%

One-session classes or presentations: Respondents were asked the following question: “Thinking about your programming over the last 12 months, how many one-session classes or presentations have you offered, i.e. programs not part of a multi-day or multi-week course?” The most common response — from 37.4% of respondents — was “26 or more.”⁸



Number of one-session classes or presentations offered in the past 12 months	
0	10.4%
1-2	4.3%
3-5	12.9%
6-10	12.3%
11-25	22.7%
26 or more	37.4%

Special Interest Groups (“SIGs”): Special Interest Groups devoted to topics of activities outside scheduled classes and lectures are an important part of LLI life. In descending order, the most common SIGs among the choices provided on the survey are:



Special Interest Groups	
Book Discussion	74.4%
Writing	51.2%
Current Events	46.5%
Computers/Technology	38.0%
Travel	37.2%
Fine Arts (Painting, Sculpture, etc.)	34.9%
Bridge	34.1%
Walking/Hiking	33.3%
Crafts (Woodworking, Pottery, Needlecrafts, etc.)	27.1%
Gardening	26.4%

⁸ The fact that the choice at the end of the range (“26 or more”) was the most common response indicates that the scale for this question was not properly designed. This will be corrected in subsequent surveys.

Genealogy	20.9%
Investing	20.1%
Mah Jongg	20.1%
Bicycling	9.3%
Chess	5.4%
Pickleball	4.6%
Pinochle	3.9%
Cribbage	2.3%
Bonsai	1.5%

Other SIGs mentioned in the open-ended choice include dancing, healthy living, world history and local history, language study, “lunch bunch,” movies, music, “night on the town,” opera, philosophy, photography, poetry, potluck dinners, religion, science, Shakespeare, ukulele, and wine making.

Trips and Excursions: Most LLIs (85.3%) offer day trips or excursions to their members, with 38.9% offering six or more of these trips each year. Fewer offer overnight trips: 31.5% offer overnight bus trips, 15.6% offer North American trips requiring air transportation, and 24.8% offer international trips.



	Number and Variety of Trips and Excursions				
	0	1	2	3-5	6 or more
Day trips or excursions	14.7%	7.6%	10.2%	28.7%	38.9%
Overnight drive- or bus-to trips within the United States or Canada	68.5%	9.8%	13.3%	7.7%	0.7%
Overnight trips within the United States or Canada requiring air transportation	84.4%	10.6%	4.3%	0.7%	0.0%
International trips (not to the United States or Canada)	75.2%	16.6%	3.5%	4.8%	0.0%

Fees: This open-ended question asked respondents to “please describe your fee structure in the space below, indicating whether it is semester- or course-based (or assessed on some other basis) and what the membership fee is?” One-hundred-forty-eight (86.0%) of the 172 survey respondents supplied answers to this question. Some answers were incomplete or unclear, and were not included in this analysis.

110 respondents said they had an annual membership fee, ranging from a low of \$5 to a high of \$980. Many LLIs offer a modest discount for couples living at the same address who join together; the following charts

show the distribution of *individual* annual membership fees.

Annual Membership Fee Breakdown (Total)							
\$5	1	\$60	9	\$150	5	\$350	1
\$15	4	\$65	2	\$165	1	\$360	1
\$20	5	\$70	1	\$175	1	\$380	1
\$25	11	\$75	2	\$180	1	\$385	1
\$30	5	\$80	2	\$225	2	\$410	1
\$33	1	\$100	1	\$235	1	\$465	1
\$35	9	\$110	3	\$250	3	\$500	1
\$40	7	\$125	3	\$290	1	\$625	1
\$45	1	\$130	1	\$300	1	\$800	1
\$50	11	\$135	1	\$325	1	\$980	1
\$55	3						

The most common annual fee amounts are \$25 and \$50, with 11 responses each, and \$60, with nine responses. The median or middle value is \$52.50, and the mean (driven up by a handful of very high annual membership fees) is \$117.93.

Of the 110 LLIs with annual membership fees, 31 said explicitly that there was no additional per course fee (except where a specific course might have out-of-pocket costs such as purchasing wine for wine tasting), 51 said explicitly that there was an additional per-course charge, and 28 did not indicate one way or another or gave an unclear or ambiguous answer.

Not surprisingly, the 31 LLIs with no additional per course fees had higher annual membership fees.

Annual Membership Fee Breakdown (No Additional Per Course Fees)							
\$5	0	\$60	4	\$150	2	\$350	1
\$15	0	\$65	2	\$165	1	\$360	1
\$20	0	\$70	0	\$175	1	\$380	1
\$25	0	\$75	0	\$180	1	\$385	0
\$30	0	\$80	0	\$225	0	\$410	1
\$33	0	\$100	1	\$235	1	\$465	1
\$35	2	\$110	2	\$250	2	\$500	0
\$40	1	\$125	1	\$290	1	\$625	1
\$45	0	\$130	0	\$300	0	\$800	0
\$50	1	\$135	0	\$325	1	\$980	0
\$55	1						

The most common annual fee amount in this group is \$60, the median is \$150, and the mean is \$186.77.

The 51 LLIs with annual membership fees *and* additional per course fees were, of course, typically lower and arrayed as follows:

Annual Membership Fee Breakdown (Additional Per Course Fees)							
\$5	0	\$60	2	\$150	1	\$350	0
\$15	4	\$65	0	\$165	0	\$360	0
\$20	5	\$70	1	\$175	0	\$380	0
\$25	10	\$75	0	\$180	0	\$385	0
\$30	3	\$80	1	\$225	0	\$410	0
\$33	1	\$100	0	\$235	0	\$465	0
\$35	6	\$110	1	\$250	0	\$500	0
\$40	5	\$125	1	\$290	0	\$625	0
\$45	1	\$130	0	\$300	0	\$800	0
\$50	9	\$135	0	\$325	0	\$980	0
\$55	0						

The most common annual membership fee in this group is \$25 (10 respondents), the median is \$35, and the mean is \$41.04.

Many LLIs with annual membership fees also offered the option of paying by semester or session; another 24 have a session membership fee *only*, arrayed as followed:

Semester/Session Membership Fee Breakdown (for individual)							
\$5	2	\$25	2	\$75	1	\$120	1
\$10	1	\$30	1	\$80	2	\$125	1
\$15	1	\$40	4	\$95	1	\$130	1
\$20	2	\$60	2	\$100	2		

The most common session membership fee is \$40, the median is also \$40, and the mean is \$55.83.

Twenty-eight of the LLIs with per-course fees allowed participants or members to enroll and pay for single courses, with per course fees arrayed as follows:

Per Course Fee for One Course							
\$2	1	\$10	4	\$30	2	\$55	1
\$5	6	\$12.50	1	\$35	2	\$60	2
\$7	1	\$15	2	\$45	1	\$90	1
\$8	1	\$20	1	\$50	2		

The most common per-course fee is \$5, the median fee is \$13.75, and the mean is \$24.63. (Note: some LLIs in this group added extra fees for in-course materials where applicable.)

Six other LLIs said they have per-course fees ranging from \$10 to \$150, five have course fees — in addition to an annual or session membership fee — ranging from \$15 to \$125 for an unlimited number of courses, and four had intermediate extra course fee structures: up to two courses for \$120, up to three for \$190, up to four for \$175, and up to six for \$85.

Many other LLIs had other per-course pricing structures based on quantity discount, course hours, or other criteria. A selection of these arrangements is described below:

- One course for \$7, two for \$11, three for \$13, four for \$15, six for \$17, seven for \$19, eight for \$20.
- Course packages priced as follows: six for \$210, nine for \$275, 15 for \$325.
- \$80 per course for two, \$70 per course for three, \$60 per course for four, \$50 per course for five.
- \$10 per hour.

Other Comments

At the end of the survey respondents were invited to add “additional comments you think would be helpful for other LLIs to know about your LLI.” These comments — mostly suggestions others might benefit from — included:

- “Fundraising is done to support the cost of the programs [including] walkathons, golf tournament, book sales, sponsorships, and grant applications. Although we are affiliated with [the university] we do not receive any direct financial support. We are a self-supporting organization with an independent Board of Directors.”
- “We also offer what we call “OLL ONLINE” courses — usually two in the spring/fall and one in winter. These courses are made available using Adobe Connect Pro. This is helpful for those with

schedule conflicts or for one reason or another do not want to leave home. If an individual taking a course that is also being offered online needs to miss a class session, then they will receive a link to a recording of the class. We are also making our members-only lecture available in this format with the permission of the presenter.”

- “Volunteers are crucial and play an active role at every level of the organization including leadership and policy development, training other volunteers, curriculum planning and scheduling, marketing/communication, presenting classes, [and] fundraising. Even the volunteer appreciation events are planned and carried out by other volunteers.”
- “We have no cost for facilities, or reproduction. Our community has a transportation department with which provides reasonable prices for local trips. We are a CCRC (Continuing Care Retirement Community) with about 2,000 residents. Our costs are minimal. We offer about 100 different courses in a yearly catalog with a midyear supplement.”
- “[We] have three social events per year — [a] picnic in September, holiday party in December, and annual meeting in June.”
- “Our program is different than any other program we know about. We offer OLLI courses that normally only last three to four weeks and offer a few semester-long classes in partnership with a regular university class. We offer special events that can be travel, tours, eating, demonstrations, or anything that does not fit into another category. We also offer at least one weekly presentation that is free and open to the public. We offer at least 55 different programs every session and our sessions last four months, so we have programming twelve months out of the year.”
- “Our LLI is in a small town in a rural area. Our members come from 28 different zip codes spread over extended distances; many travel more than one hour to attend classes and other programs.”
- “Each year, we request that the state legislature pass a resolution declaring September New York State Lifelong Learning Month. We publicize this and offer a free and open-to-the-public special event in recognition. We believe we are the only state to have a designated Lifelong Learning Month. We believe it is part of our mission to offer quality academic programs free and open to the general public. These have been very popular, especially our winter Storytellers Series. They have garnered much positive publicity for our program and are a good source of new members.”
- “We offer a free access (for Full Members) to the Mango Language Program, which allows them to learn over 70 languages on their computer, tablets, laptop, and smart phones and a free access to tutorial videos to learn more than hundreds of software programs.”
- “Join local Chamber of Commerce. Place promos in host newsletters and web site. Offer to speak at local civic org meetings. Offer a social event as part of a general membership meeting.”
- “We compensate our speakers at \$200/session, \$225 for those with long commutes.”

- “We have had recent growth most likely attributed to strong curriculum choices and involved members actively recruiting.”
- “The College expects us to be self-supporting, to neither make a profit nor operate at a loss. We benefit from the Delta Kappa Gamma chapter’s support for our fellowship and hospitality, and have a line in their annual budget. This is mutually helpful. We make sure that the College Board of Directors and administrative staff know of our current happenings, and they are always invited to participate.”
- “Our course package structure is a terrific way to build a core set of members who are committed to the program for the year. They tend to be the ones who volunteer the most, donate the most and advocate the most. Building a membership is great, but in building this core group of people we have a solid broad foundation of support and buy in which builds a sense of ownership to the program. To encourage these members to stay involved, they are able to buy their classes a few days before single course purchasers.”
- “After being president of [a university-affiliated LLI], I found that establishing an ILR in my own community had a number of advantages. It is quite possible to develop an ILR without any university affiliation, although we continue to make regular use of University Faculty for both our weekly ‘Medical Update’ classes, and our Thursday afternoon ‘Samplers,’ programs open to the whole community. (Today we have a climate scientist from [the University] talking about climate change.) I found my annual costs to belong to the [university-affiliated] program were in the \$400 range, included a long drive to the University, and involved parking problems. When I was on the Board, we constantly fought with the University administration to obtain and retain classroom space, and the fees for parking kept escalating. I am pleased that our self-contained program works so well. This semester we have 14 classes going on, with enrollments ranging from 22 to 75. Our oldest moderator is 89, and he does a great job of moderating discussions on current political issues.”
- “Our seminars are coordinated by members — there are no paid coordinators or speakers. We offer four primary styles of seminars: Participatory — members of the seminar actively participate by making presentations; coordinator-led — coordinator determines the format, which may include outside speaker, films, etc.; discussion — interactive seminar where all the members participate in discussion (these are usually small groups of 20 or so); activities/social — physical activities (yoga, meditation, walking, etc.) or social (dining together, camping, etc.)”
- “Over the last six years the percentage of women to men members has changed from 70%-30% to 50-50%. Six years ago we had no one in their 60s and now we have a growing group, primarily men. The demand of these younger members is for little or no peer-led learning, and [more] heavy-hitting professor-led lectures, with an emphasis on history, politics, literature, etc.”
- “We maintain a social media presence on Facebook (currently 189 followers), Twitter (666 followers), and YouTube (88 clips of classes).”

- “Since August 2009 we have been a 501(c)(3) organization. As such, we are pretty independent of the University. The University began charging us for use of space in September 2013.”
- “We are very happy to have an Advisory Board. They have been extremely helpful in shaping our program since the very beginning. We are very happy that we do not have a governing board. It has made the decision-making process more manageable because we do not have to wait for various committees to meet and make decisions. We do not have a lot of different committees to oversee so we are able to devote our time to planning classes, events, and recruiting members. We get many of our best ‘leads’ for classes from our Advisory Board and our members. Members still feel ownership of the program without serving on committees because they have an opportunity to state their likes and dislikes about the program on evaluation forms or to come in and talk to us.”
- “We are in the process of becoming an independent LLI. The University which has hosted our LLI since its founding in 2000 decided that it no longer wishes to do so. We have now become a non-profit organization in Massachusetts and have an application pending to become a tax exempt non-profit. We intend to remain independent for the foreseeable future to see how that works out. We may choose at a later date to try to find another college or university in our catchment area to host our program. Fortunately, we are solid financially and programmatically and are looking forward to being on our own without the constraints of the university relationship.”

Conclusions and Commentary

Establishing a Benchmark: The value of this research will in large measure be determined by what readers of this report glean from it and find useful in managing their own Lifelong Learning Institutes. More generally, one of its higher values will be in establishing a benchmark for future research, both as draft to which we together can make steady improvements, and as a first set of responses that can serve as an anchor for establishing trends over time.

For both of these purposes we need your help. We welcome your emails — to peter.spiers@roadscholar.org — with answers to one, several, or all of the following questions:

1. What observations do you have about these results? What surprised you? (If we gather a sufficient number of answers to this question we’ll follow up with a summary of what you told us.)
2. How will you use these results at your LLI?
3. What questions were not designed well? How could they be improved?
4. What didn’t we ask that we should have asked?

Thank you in advance for your response. We’re tentatively planning to repeat this survey in late 2015, and your feedback will be an essential component to making “round two” more valuable to you and the wider lifelong

learning movement.

Other Research: While we consider changes to *this* survey, we're tentatively planning another type of survey scheduled for field research late in 2014. The new survey — which we hope to administer in alternate years from the Institutional Survey — will focus on creating a profile of the demographics, interests, and attitudes of rank-and-file LLI members. The Membership Survey will be administered so that individual member email addresses aren't visible to Road Scholar or the Road Scholar Institute Network, but also so that individual LLIs will receive a detailed profile of their membership both on a stand-alone basis *and* in comparison with all of the individual respondents from other LLIs.

If you would like to be part of the advisory council for creating this survey, or have specific ideas about what topics the survey should cover, please send me an email.

Peter Spiers
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Appendices

Appendix I – Survey Text

Road Scholar Institute Network (RSIN) Member Survey

Dear RSIN member,

Welcome to the first annual Road Scholar Institute Network (RSIN) Member Survey. The survey gathers information from LLIs on three major topics membership, administration and programs and only LLIs completing the survey will have access to the full results. We'll prepare and distribute an executive summary to ALL LLIs, including those who chose not to complete the survey, but survey participants will receive a bound copy of the complete report, containing charts and detailed commentary. We estimate that the survey will take approximately 30 minutes to complete. Some questions requiring specific data may be difficult or impossible to answer. If you lack specific data, please give your best educated estimate or check the "Not Sure" answer choice. Other questions don't require an answer. For these, if you believe your answer would be sheer guesswork, don't hesitate to skip the question entirely. (All survey responses will be held in confidence with quantitative results shared in the aggregate and qualitative responses included anonymously and attributed only to a region.) The more LLIs completing the survey, the more valuable the results will be. Thank you for your help and your participation. We look forward to sharing the results with you early in 2014!

Nancy Merz Nordstrom
Program Manager, Road Scholar Institute Network

Peter Spiers
Senior Vice President, Road Scholar

Directory Listing Information

1. Please provide complete and accurate information about your Lifelong Learning Institute below. We will use this information to update your listing on the Road Scholar Institute Network website (www.roadscholar.org/rsin).

Contact Name/Title:

Lifelong Learning Institute Name:

Address 1:

Address 2:

City/Town:

State/Province:

ZIP/Postal Code:

Country:

Contact Email Address:

Contact Phone Number:

2. Please provide the following information about your LLI.

Year Founded:

College or University Affiliations:

LLI Website URL:

3. Do you wish to have your Lifelong Learning Institute included in the Road Scholar Institute Network's listing of OLLIs, LLIs, and other learning/retirement organizations, for the next 12 months?

- Yes
- No

Membership

4. Approximately how many TOTAL names and addresses do you have on your mailing list, including active, lapsed, and prospective members? (Please check ONE answer only.)

- 500 or fewer
- 501-1000
- 1001-1500
- 1501-2500
- 2501-5000
- 5001 or more
- Not Sure

5. Approximately how many TOTAL paid members does your LLI have, i.e. individuals who have, in the last 12 months, paid a membership fee, paid a courseenrollment fee, or made a financial donation to your organization? (Please check ONE answer only.)

- 100 or fewer
- 101-200
- 201-300
- 301-500
- 501-750
- 751-1000
- 1001-1500
- 1501-2000
- 2001 or more
- Not Sure

6. What estimated percentage of your 12-month paid membership (see Question 4) is represented by each of the following age bands? (Please check ONE answer per row.)

	0%	1-10%	11-20%	21-30%	31-40%	41-50%	51% or more
49 years old or younger	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
50-59 years old	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
60-69 years old	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
70-79 years old	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
80-89 years old	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
90-99 years old	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100 years old or older	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. What estimated percentage of your 12-month paid membership (see Question 4) is represented by each of the following membership tenure bands? (Please check ONE answer per row.)

	0%	1-10%	11-20%	21-30%	31-40%	41-50%	51% or more
Less than 1 year as a member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1-2 years as a member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3-5 years as a member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6-9 years as a member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10 or more years as a member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Approximately how many NEW paid members does your LLI have, i.e. individuals who have, in the last 12 months, paid a membership fee, paid a courseenrollment fee, or made a financial donation to your organization for the first time? (Please check ONE answer only.)

- 25 or fewer
- 26-50
- 51-100
- 101-150
- 151-250
- 251 or more
- Not Sure

9. What estimated percentage of your NEW 12-month paid membership (see Question 6) is represented by each of the following age bands? (Please check ONE answer per row.)

	0%	1-10%	11-20%	21-30%	31-40%	41-50%	51% or more
49 years old or younger	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
50-59 years old	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
60-69 years old	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
70-79 years old	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
80-89 years old	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
90-99 years old	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100 years old or older	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. What estimated percentage of your membership comes to the primary location of your LLI from the following distances in miles? (Please check ONE answer per row.)

	0%	1-10%	11-20%	21-30%	31-40%	41-50%	51% or more
Less than 5 miles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6-10 miles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11-25 miles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26 or more miles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. In descending order, what are your most effective and productive sources of new members? (Please check ONE answer per row, and ONE answer per column.)

	First choice (most effective)	Second choice	Third choice	Fourth choice (least effective)
Paid media, i.e. paid advertising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Referrals from current members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Direct mailings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Free media, i.e. articles or mentions in newspapers, on radio or television, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)				

12. What are your three biggest concerns and challenges regarding attracting new members to and retaining current members of your LLI? (This questions REQUIRES at least one answer.)

Biggest:

Second biggest:

Third biggest:

Other concerns and challenges:

Administration

13. Does your LLI have written bylaws? (Please check ONE answer only.)

Yes

No

14. How many full- or part-time paid staff members are there at your LLI? (Please check ONE answer only.)

0

1

2-3

4-5

6 or more

15. How many volunteers (giving on average at least one hour per week when classes are in session) support your LLI?

0

1-5

6-10

11-25

26 or more

16. Please indicate whether the following positions in your LLI are filled by paid or volunteer staff, or whether you do not have this position?

	Paid	Volunteer	We do not have this position
Executive Director	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administrative Assistant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Classroom Coordinator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Development Officer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing/Communications Coordinator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Membership Coordinator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program Coordinator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travel Programs Coordinator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)			

17. Please describe the responsibilities of your LLI's Executive Director or equivalent.

18. Please indicate which of the following standing administrative committees operate at your LLI? (Please check ALL that apply.)

- None
- Bylaws
- Curriculum
- Development/Fundraising
- Finance/Budget
- Long-Range Planning
- Membership
- Public Relations
- Scholarships
- Special Events
- Travel
- Volunteer Development
- Other (please specify)

19. Including your primary location and “offsite” locations, how many different venues does your LLI offer classes in? (Please include all distinct locations in your count but not, for example, multiple classrooms in one building, or multiple buildings substantially in the same location.) (Please check ONE answer only.)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10 or more

20. Please use the space below to describe any specific challenges you have, or creative solutions you have reached, regarding space acquisition, utilization, or parking.

21. Have you or other representatives from your LLI attended a regional or national LLI conference in the last 12 months? If so, please use the space below to say which conference you attended, and who (by title or role) from your LLI attended.

22. Provided it was at a reasonable cost and at a convenient time, would you or others from your LLI be interested in attending an LLI conference in your region?

- Yes
- No

23. For each of the following elements or topics for a regional conference, please indicate how interested you are in that element or topic. (Please check ONE answer per row.)

	Very Interested	Somewhat Interested	Somewhat Uninterested	Very Uninterested
Networking with representatives from other LLIs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Touring host LLI facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Membership development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Curriculum/program development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Host institution relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Space acquisition and utilization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Market research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What other topics would you be interested in?				

Programs

24. In which of these months does your LLI offer multiweek classes or programs for which a fee is charged? (Please check ALL that apply.)

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

25. Approximately how many multiweek classes did your LLI offer in 2013?

- 0-5
- 6-10
- 11-25
- 26-50
- 51-75
- 76-100
- 101-150
- 151-200
- 201 or more

26. Some LLIs offer "intersession" programming between regular semesters, often comprising shorter classes, lectures, and special events. Does your LLI offer programming fitting this definition?

- Yes
- No

If "Yes," please describe this programming

27. Thinking of all the classes you offered over the last 12 months, what estimated percentage were taught, led, or facilitated by the following types of instructors? (Please check ONE answer per row.)

	0%	1-10%	11-20%	21-30%	31-40%	41-50%	51% or more
Active college or university faculty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Retired college or university faculty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Individuals from your community who are not LLI members (e.g. a lawyer teaching a course on "Justice")	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LLI members who are not active or retired college or university faculty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

28. Thinking about your programming over the last 12 months, how many onesession classes or presentations have you offered, i.e. programs not part of a multiday or multiweek course? (Please check ONE answer only.)

- 0
- 1-2
- 3-5
- 6-10
- 11-25
- 26 or more

29. Which of the following clubs or interest groups have been active at your LLI in the last 12 months? (Please check ALL that apply.)

- Bicycling
- Bonsai
- Book Discussion
- Bridge
- Chess
- Computers/Technology
- Crafts (Woodworking, Pottery, Needlecrafts, etc.)
- Cribbage
- Current Events
- Fine Arts (Painting, Sculpture, etc.)
- Gardening
- Genealogy
- Investing
- Mah Jongg
- Pickleball
- Pinochle
- Travel
- Walking/Hiking
- Writing
- Other (please specify)

30. For each of the following types of excursions and trips, please indicate how many of them your LLI or its travel committee has offered to its members over the last 12 months. (Please check ONE answer per row.)

	0	1	2	3-5	6 or more
Day trips or excursions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overnight drive- or bus-to trips within the United States or Canada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overnight trips within the United States or Canada requiring air transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International trips (not to the United States or Canada)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

31. Please describe your fee structure in the space below, indicating whether it is semester- or course-based (or assessed on some other basis) and what the membership fee is?

32. Please use the space below to write any additional comments you think would be helpful for other LLIs to know about your LLI.

33. In case we need to contact you for additional information or clarification, please write the name and contact information for the individual who completed the survey below.

Name:

Role at LLI:

Telephone Number:

Email Address:

Thank you for completing the survey!

Appendix II – List of Responding LLIs

These 172 Lifelong Learning Institutes submitted complete or substantially complete surveys.

Alabama

- OLLI at Auburn University, Auburn
- Institute for Learning in Retirement, University of North Alabama, Florence
- OLLI at University of Alabama in Huntsville, Huntsville

Alaska

- OLLI at University of Alaska Fairbanks, Fairbanks

Arizona

- Lifelong Learning in Retirement at The Highlands, Marana
- New Frontiers for Lifelong Learning, Mesa Community College, Mesa
- Sun City Oro Valley ILR, Oro Valley
- New Adventures in Learning, Chandler-Gilbert Community College, Sun Lakes

British Columbia

- Society for Learning in Retirement, Kelowna
- Lifelong Learning Centre Society, University of the Fraser Valley/University of Victoria, Mission

California

- Levan Institute for Lifelong Learning, Bakersfield College, Bakersfield
- OLLI at University of California Berkeley, Berkeley
- RAIN Live Oak Distance Learning Network, Buellton
- OLLI at California State University Long Beach, Long Beach
- Modesto Institute for Continued Learning, Modesto Junior College, Modesto
- The Renaissance Society, California State University Sacramento, Sacramento
- Vistas Lifelong Learning, Santa Barbara
- OLLI at University of the Pacific, Stockton

- Stockton Institute for Continue Learning, San Joaquin Delta College, Stockton

Colorado

- The PILLAR Institute for Lifelong Learning, Colorado Springs
- The Academy for Lifelong Learning, Englewood

Connecticut

- LIR, Quinebaug Community College, Danielson
- Middlesex Institute for Lifelong Education (MILE), Middlesex Community College, Middletown
- Lifetime Learners Institute, Norwalk Community College, Norwalk
- ILR at Albertus Magnus College, Orange
- Learning in Retirement, Stamford
- OLLI at University of Connecticut Waterbury, Waterbury

Delaware

- OLLI at the University of Delaware, Newark

Florida

- Institute for Learning in Retirement, Boca Raton
- Lifelong Learning Institute, Nova Southeastern University, Fort Lauderdale
- Fielden Institute for Lifelong Learning at Indian River State College, Fort Pierce
- Institute for Learning in Retirement, University of Florida, Gainesville
- OLLI at University of North Florida, Jacksonville
- Brevard Elderlearning, Eastern Florida State College, Merritt Island
- Frances Pew Hayes Center for Lifelong Learning, Hodges University, Naples
- Learning Institute for Elders at the University of Central Florida, Orlando
- Leisure Learning Society, University of West Florida, Pensacola
- ASPEC, Eckerd College, St. Petersburg
- OLLI at Florida State University, Tallahassee

- OLLI at University of South Florida, Tampa

Georgia

- OLLI at University of Georgia, Athens
- OLLI at Emory University, Atlanta
- Columbus Academy for Lifelong Learning, Columbus State University, Columbus
- OLLI at University of Georgia, Washington Affiliate, Washington
- Institute for Continued Learning at Young Harris College, Young Harris

Idaho

- OLLI at Boise State University, Boise
- Friends for Learning, Idaho State University, Idaho Falls

Illinois

- OLLI at University of Illinois Champaign-Urbana, Champaign
- Academy of Lifelong Learning, Eastern Illinois University, Charleston
- Renaissance Academy, St. Xavier University, Chicago
- OLLI at Northwestern University, Evanston
- Northern Illinois University Lifelong Learning Institute, DeKalb
- Senior Professionals of Illinois State University, Normal
- Lifelong Learning Institute, Harper College, Palatine
- OLLI at Bradley University, Peoria
- Center for Learning in Retirement, Rock Valley College, Rockford
- Institute for Continued Learning at Roosevelt University, Schaumburg
- Academy of Lifelong Learning at Lincoln Land Community College, Springfield
- Lifelong Learning Institute at Waubensee Community College, Sugar Grove

Indiana

- Lifelong Learning Institute of Elkhart County, Goshen College, Goshen
- OLLI at Indiana State University, Terre Haute
- Wabash Area Lifetime Learning Association (WALLA), Purdue University, West Lafayette

Iowa

- OLLI at Iowa State University, Ames
- Iowa Western Community College, Council Bluffs
- Iowa City Senior Center, Iowa City
- The Institute for Lifelong Learning, Western Iowa Tech Community College, Sioux City

Kansas

- Golden Tigers, Cowley County Community College, Arkansas City

Kentucky

- Veritas Society, Bellarmine University, Louisville

Maine

- University of Maine at Augusta Senior College, Augusta
- Senior College at Bridgton, Bridgton
- Gold LEAF Institute, University of Maine at Farmington, Farmington

Maryland

- Renaissance Institute, Notre Dame of Maryland University, Baltimore
- ELLIC (Elderhostel Life Long Learning Institute at Charlestown), Catonsville
- Lifelong Learning at Hagerstown Community College, Hagerstown
- Peer Learning Partnership, Anne Arundel Community College, Severna Park

Massachusetts

- OLLI at University of Massachusetts Boston, Boston
- Harvard Institute for Learning in Retirement, Cambridge
- The Second Half: Lifelong Learning Institute, Fall River
- Northern Essex Community College Life Long Learning, Haverhill
- OLLI at Tufts University, Medford
- Five College Learning in Retirement, Amherst College/Hampshire College/Mount Holyoke College/Smith College/University of Massachusetts Amherst, Northampton
- Explorers Lifelong Learning Institute, Salem State University, Salem
- Lifelong Learning at Regis College, Weston

Michigan

- OLLI at University of Michigan, Ann Arbor
- Institute for Learning in Retirement, Battle Creek
- ILR-Kellogg Community College, Battle Creek
- Society of Active Retirees (SOAR), Wayne State University, Farmington Hills
- OLLI at Aquinas College, Grand Rapids
- LSSU Elders, Lake Superior State University, Sault Ste. Marie
- OLLI at Saginaw Valley State University, University Center

Minnesota

- Unlimited Learning, Deerwood
- Mankato Area Lifelong Learners, Minnesota State University Mankato, Mankato

Mississippi

- Institute for Learning in Retirement, Copiah-Lincoln Community College, Wesson

Missouri

- Lifelong Learning Institute-Washington University St. Louis, Saint Louis

Nevada

- OLLI at University of Nevada Las Vegas, Las Vegas

New Hampshire

- LINEC, The Learning Institute at New England College, Concord
- OLLI at Granite State University, Concord
- Cheshire Academy for Lifelong Learning, Keene State College, Keene
- ILEAD, Dartmouth College, Hanover
- Rivier Institute for Senior Education (RISE), Rivier University, Nashua
- Adventures in Learning, Colby-Sawyer College, New London

New Jersey

- OLLI at Rutgers University, New Brunswick
- Lois E. Marshall Institute for Learning in Retirement, Bergen Community College, Paramus
- Cedar Crest Village, Pompton Plains

New Mexico

- Encore, San Juan College, Farmington

New York

- The Lifetime Learning Institute at Bard College, Annandale-on-Hudson
- Brooklyn Lifelong Learning, Brooklyn College, Brooklyn
- Schoharie City Home of Ongoing Learning (SCHOOL), State University of New York Cobleskill, Cobleskill
- Lifetime Learning at Peconic Landing, Greenport
- Adult Learning Institute, Columbia-Greene Community College, Hudson
- Learning in Retirement at Iona College, New Rochelle
- Institute for Retired Professionals, New School, New York
- L.I.F.E. at Mount Saint Mary College, Newburgh

- The Learning Collaborative, LIU Hudson at Rockland, Orangeburg
- Molloy Institute for Lifelong Learning, Molloy College, Rockville Center
- Academy for Lifelong Learning at Saratoga Springs, SUNY Empire State College, Saratoga Springs
- Lifespring: Saugerties Adult Learning Community, Saugerties
- OLLI at Stony Brook University, Stony Brook
- Mohawk Valley Institute for Learning in Retirement (MVILR), State University of New York Institute of Technology, Utica
- Collegium for Lifelong Learning, Westchester Community College, Valhalla

North Carolina

- Davidson Learns, Davidson
- OLLI of Duke University, Durham
- Encore Program for Lifelong Enrichment, North Carolina State University, Raleigh
- OLLI at University of North Carolina Wilmington, Wilmington

Ohio

- The Center for Lifelong Learning, Northwest State Community College, Archbold
- Rose Institute for Life Long Learning, Beachwood
- Lifelong Learning Institute, The Ohio State University at Lima, Lima
- College for Lifelong Learning, Sinclair Community College, Dayton
- Lourdes Lifelong Learning, Lourdes University, Sylvania

Ontario

- Encore Education Centre, St. Lawrence College, Cornwall
- Programs for 50+ LIFE Institute, Ryerson University, Toronto

Oregon

- Portland Community College Senior Studies Institute, Portland
- The Institute for Continue Learning, Willamette University, Salem
- Chemeketa Center for Learning in Retirement, Chemeketa Community College, Woodburn

Pennsylvania

- The Older Adult Learning Center, East Stroudsburg University, East Stroudsburg
- The Lifelong Learning Institute-LifeWorks Erie, Erie
- OLLI at Widener University, Exton, Pennsylvania
- Bucknell Institute for Lifelong Learning, Lewisburg
- OLLI at Temple University, Philadelphia
- OLLI at the University of Pittsburgh, Pittsburgh
- Rosemont College Forum and Non-Credit Program, Rosemont
- Institute for Learning in Retirement, Slippery Rock University, Slippery Rock
- OLLI at Pennsylvania State University, University Park

Rhode Island

- Lifelong Learning Collaborative, Providence

Saskatchewan

- University of Regina Lifelong Learning, Regina

South Carolina

- OLLI at University of South Carolina Beaufort, Bluffton
- Center for Creative Retirement, College of Charleston, Charleston
- OLLI at Clemson University, Clemson
- OLLI at Furman University, Greenville

South Dakota

- OLLI at the University Center, South Dakota State University/University of South Dakota, Sioux Falls

Texas

- Academy for Lifelong Learning, Lone Star College, Conroe
- OLLI at UTMB Health, Galveston
- Academy for Lifelong Learning, Lone Star College North Harris, Houston

Vermont

- OLLI in St. Albans, University of Vermont, Swanton

Virginia

- Lifetime Learning Institute of Nova Community College, Annandale
- OLLI at George Mason University, Fairfax
- Mary Washington ElderStudy, University of Mary Washington, Fredericksburg
- James Madison University LLI, Harrisonburg
- The Lifetime Learning Institute in Chesterfield, Virginia Commonwealth University/John Tyler Community College, Midlothian
- LifeLong Learning Society, Christopher Newport University, Newport News
- OLLI at University of Richmond, Richmond
- Institute for Learning in Retirement, Old Dominion University, Virginia Beach
- Christopher Wren Association, The College of William and Mary, Williamsburg

Washington

- Learning is ForEver, Pacific Lutheran University, Tacoma

West Virginia

- Lifelong Learning at Shepherd University, Shepherdstown

Wisconsin

- Society for Learning Unlimited (SLU), Beloit College, Beloit
- Adventures in Lifelong Learning, University of Wisconsin Parkside, Kenosha
- Learning in Retirement, University of Wisconsin La Crosse, La Crosse
- PLATO-Participatory Learning and Teaching Organization, University of Wisconsin Madison, Madison
- OLLI at the University of Wisconsin Milwaukee, Milwaukee
- Learning in Retirement at Nicolet College, Rhinelander
- Learning is ForEver (LIFE), University of Wisconsin Stevens Point, Stevens Point

Wyoming

- OLLI at Casper College, Casper

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