

Adult Learning and Executive Education Committee
Annual Report to the Faculty Senate
April 17, 2017

Committee Members

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Charge: *To actively consult with the Provost's Office and the Office of Continuing Professional Education to support, evaluate and refine programs in the areas of adult learning and executive education, including program development, admission policies, awareness programs, online resources, program evaluation, and degree completion initiatives.*

Focus for AY 2016-2017: Identify entities at the university and college levels currently offering adult learning/executive education opportunities.

Results: The Committee has identified the Osher Lifelong Learning Institute (OLLI) and Mason Learning Solutions (MLS) as offering programs specifically targeted to adult learning and executive education audiences. College-level offerings are largely ad hoc.

- **OLLI:** Continues to offer membership-based non-credit/non-degree courses and events targeted to Northern Virginia retirees. In addition to the three Mason Fairfax County campuses, there are 120 OLLI-affiliated sites nationwide, with international partners to be sought in future. Anecdotal evidence indicates member satisfaction with OLLI offerings, although the cost of membership (\$425/year) may be a challenge for some. The annual budget is \$600K, 20% of which is covered by OLLI's endowment and 80% by membership dues, with additional funds from individual member contributions. In a phone interview with Jennifer Disano, OLLI's Executive Director, issues affecting OLLI's future include (a) 20% annual turnover in membership (member retention); (b) lack of monetary compensation for Mason faculty teaching OLLI courses; (c) run by volunteers and supported by a skeletal staff in the areas of finance, communication, program planning, and audio-visual support; (d) the need for addition classroom space and associated equipment and ancillary expense increases to accommodate program growth. Tangible benefits to Mason have included OLLI member (a) participation in Mason research studies, (b) mentoring at Mason's Career services, (c) Board membership of the Mason Library and the Arts program, and (d) \$250K in contributions to Mason's campaigns over the past 25 years. OLLI has also provided scholarship awards to individual departments, such as two \$2,500 awards to the Department of Criminology, Law and Society for conducting classes for OLLI in 2016 and 2017 respectively. **Bottom line:** Mason should continue to support OLLI as a strategic partner for local, regional and national outreach (see Appendix A for detailed findings on OLLI).
- **MLS:** An independent, self-funded business unit resulting from the merger of CPE with non-degree executive education programs from the School of Business. Focused on

competency-based professional and leadership development offerings to the Federal government and private industry, MLS has a total budget of \$10 million for 2016-2017. The largest revenue stream comes from customized, contract courses and programs offered in closed organizational cohorts and is the primary source of future growth; the old CPE inventory of open enrollment courses accounts for less than one-third of total budget and is expected to remain static due to course/program obsolescence and high costs of open enrollment marketing, according to MLS Executive Director Brad Dawson. MLS uses Mason-affiliated and full-time faculty with practical experience in the relevant fields and has its own support staff and sales force that follows the highly successful business school model of executive education based on organizational learning needs assessments with the CEO/CLO as the entrée into the organization. **Bottom line:** MLS is a self-supporting business unit that allows Mason to build a regional and (in the long-term) national and international presence in the lucrative Executive Education market without support from public funds (see Appendix B for detailed findings on MLS).

- **College-level Offerings:** Volgenau’s Research Centers have some executive education offerings that are highly-specialized, classified, and targeted toward selected Federal agencies and taught by faculty with Federal Government security clearances. CEHD piloted an Executive Chief Learning Officer (ECLO) Graduate Certificate program that has subsequently been handed off to MLS as the foundation for a non-credit, closed cohort offering. Neither COS nor CHSS offer non-credit executive education but have occasionally offered classes on a contractual basis. The Atmospheric Ocean and Earth Sciences department in COS has allowed working professionals in the field to audit some of the for-credit classes for career development purposes and has expressed an interest in adapting the content of some of the for-credit courses for delivery to non-degree/corporate audiences, contingent upon impact on faculty teaching loads. **Bottom line:** At the college level, there have been limited ventures into the adult learning and/or executive education market, with only the classified Federal offerings from Volgenau as sustainable and ongoing.

Summary: The Adult Learning and Executive Education Committee acknowledges that research to date has not been exhaustive and that there may be as yet undetected “pockets” of adult learning and/or executive education at Mason. However, based on information to date, it appears that Mason Learning Solutions is and probably should remain the heart of Mason’s executive education efforts, while Osher Lifelong Learning Institute should remain a strategic partner for local, regional and national outreach, with many tasks and issues surrounding adult learning and executive education still to be explored.

Respectfully submitted,
Shahron Williams van Rooij, Chair

Osher Lifelong Learning Institute (OLLI)

The Osher Lifelong Learning Institute (OLLI) offers free courses to retired Northern Virginia residents. The OLLI website <http://olli.gmu.edu> provides lots of information about how OLLI works, including a button to donate to OLLI. OLLI began operations in 1991 under the leadership of the late Ms. Kathryn Brooks of Fairfax County. She received support from Mason, and the Learning and Retirement Institute was established. It was modeled after two related programs – one in New England and the other at American University. It later was renamed OLLI when the Osher Foundation contributed a \$1 Million to its endowment. That was increased to the current \$2 Million when OLLI doubled its membership to the current 1200 members.

OLLI campuses

There are three campuses at Fairfax, Loudoun and Reston. The Fairfax Campus is located at Tallwood (4210 Roberts Road) and serves as OLLI's headquarters. The Loudoun Campus is located at 21335 Signal Hill Plaza in Sterling. The Reston Campus is located at 11508 North Shore Drive in Reston, about a half mile from Lake Anne Plaza.

OLLI's impact reaches far beyond its three Fairfax County campuses. There is a network of 120 OLLY-affiliated sites across Nation, and the goal is to partner with similar organization abroad. These sites are modeled after Mason's OLLI.

Becoming a member

OLLI is a non-profit, tax-exempt, equal-opportunity 501(c)(3) organization. One can 'join' OLLI by visiting the Member Portal (<https://olligmu.augusoft.net>) or by filling out a form found in each term's paper catalog. There is a special introductory one-term rate of \$150. Members may enroll in as many courses as they want. The normal membership fee is \$425 per year, although those who cannot afford the entire fee are offered stipends. OLLI recently increased the membership fee from \$375 to \$425, and noticed a drop-off in membership.

OLLI's Mission

OLLI has various guiding principles:

- provides non-credit, non-degree-granting programs, as well as special, cultural and social events;
- is governed by its members and functions as an intellectual cooperative in which members volunteer in administration and as planners, instructors, organizational officers and committee members;
- serves as an important resource and forum for the discussion of current issues and concerns of its members and the community; and
- is an affirmative action, equal opportunity, non-profit institution.

Member opportunities

OLLI offers various types of activities, including:

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- Daytime classes, lecture and special events led by teachers from GMU, government, foreign embassies, and private industry;
- Social activities, including luncheons, open house parties and picnics; and
- Volunteer opportunities for members (<http://olli.gmu.edu/volunteer-current-opportunities/>)

OLLI Course Offerings

The OLLI course catalog is available from the website in PDF, HTML, and a FLIP document. Here is the Spring 2017 catalog (<http://olli.gmu.edu/spring-2017-catalog/>)

The catalog courses are organized into nine categories: 100 Art and Music; 200 Economics and Finance; 300 History and International Studies; 400 Literature, Theater and Writing; 500 Languages; 600 Religious Studies; 650 Humanities and Social Studies; 700 Current Events; 800 Science, Technology & Health; 900 Other topics; and Special Events.

A count of the number of courses over all categories are as follows:

- 100 Art and Music: 18
- 200 Economics and Finance: 9
- 300 History and International Studies: 18
- 400 Literature, Theater and Writing: 29
- 500 Languages: 5
- 600 Religious Studies: 6
- 650 Humanities and Social Studies: 9
- 700 Current Events: 10
- 800 Science, Technology & Health: 13
- 900 Other topics: 2
- Special Events: 41

As an example, consider the course F804 – Medical Updates from the Health Professionals at Inova Fair Oaks Hospital, which meets on Thursday from 11:50 – 1:15 pm from April 20 to May 11 and is coordinated by Cathey Weir, with medical doctors from Inova talking about such topics as: Robotic Surgery and its Applications; Wellness as You Age; and Cardiac Issues and Osteoarthritis.

Benefits of Membership in OLLI

In speaking with a current member, Mr. Richard Orlin, he stressed that OLLI is great, although the membership fee of \$425 per year is a bit steep, especially if two people want to join at \$850 per year. He did say that having a ‘gmuedu’ email address was nice. Overall, he is quite satisfied with OLLI and the course offerings.

Issues affecting OLLI in the future

In a lengthy phone interview with Ms. Jennifer Disano, OLLI’s Executive Director, we noted that OLLI’s yearly budget is \$600,000. OLLI’s endowment of \$2 Million covers 20% of the budget while the other 80% comes from membership dues. Additional funds come from individual member contributions.

Appendix A

Of the 1200 members there is a 20% yearly turnover, so retention is a problem; new members come via word-of-mouth, and Ms. Disano visits regional organizations, e.g., the CIA whose employees may be retiring and may be interested in OLLI. Ms. Disano said that if a member stays for two years, they are apt to continue with OLLI for life!

OLLI's courses are taught by Mason professors, by OLLI members who have a raft of experience, and by area experts. The teachers are not paid, and do it on a volunteer basis. For Mason centers, departments, and schools who provide instructors, OLLI 'gives back' by providing scholarships to students.

OLLI volunteers are the backbone of the organization. They are involved in fundraising, the program committee, the board of directors, membership, scheduling, curriculum, teacher recruiting, and the like.

OLLI has a skeletal staff to support the efforts of these volunteers in the areas of finance, communication and program planning, registration and audio-visual support. Some expenses include \$17,000 for parking at Tallwood, next to the swim club as well as space rental in Reston. As the course program grows OLLI will need additional classroom space and rental cost will increase. Should space be made available on Mason's Fairfax campus, a shuttle stop at Tallwood would be appreciated. Technology upgrades in the form of new computers, sound, and monitors will be needed.

Finally, Jennifer Disano had on her wish list a new building at Tallwood with ample parking and classroom space to meet future needs; its price tag \$12 Million.

The Symbiotic Relationship between Mason and OLLI

The Fairfax region boasts some of the most highly educated people in the Nation. Many seniors retire to this area because they already live here, or to be near a major source of knowledge such as George Mason. OLLI members are highly-educated retirees who contribute to the Mason community. They give back to Mason in several ways:

- Participation in Mason research studies;
- Mentoring at Mason's Career Services;
- Board members at the Mason Library and the Arts Program;
- Giving to Mason's campaigns – over the past 25 years OLLI members have contributed over \$250,000.

Conclusions

It is the opinion of the Adult Learning and Executive Education Committee (ALEE) that OLLI is of strategic importance to Mason because it provides various avenues for retired seniors to participate in Mason activities and to continue lifelong learning. In addition, OLLI's network of 120 affiliates allows it to be a hub that connects local, regional and national learning centers. Mason should continue to support OLLI to have it continue its important outreach functions.

Overview of Mason Learning Solutions (MLS)

- **Nature of the unit:** Independent, self-funded (no university or state funding) business unit focused on professional and leadership development offerings. Result of the merger and reorganization of the old Continuing Professional Education (CPE) with non-degree, not-for-credit executive education programs from the School of Business. Focuses on competencies rather than credentials (i.e., the degree).
- **Target audiences:** Federal government, corporate communities at the organizational level
- **Business Development Method:** Direct sales
- **Staff size:** 24 staff members, including an Executive Director.
- **Teaching faculty:** Mason-affiliated and full-time faculty with **practical experience** in the relevant field (rare use of tenured faculty)
- **Revenue streams:**
 - **Existing, off-the-shelf courses and programs** from the old CPE (e.g., project management, HR certification courses) consisting of **purchased/licensed content** (e.g., SHRM courses) offered in an **open enrollment** (i.e., individuals can register) model. These programs/courses are very expensive to market because (a) there is no clear target audience definition, making the cost of acquisition nearly 10 times greater than a program offered under a closed cohort (i.e., multiple individuals from one organization) model, (b) some offerings not competitive compared to what is available in the marketplace (e.g., PMP certification “boot camp”), and (c) some were the proprietary creations of an individual instructor whose services may (not) be sustainable going forward. Consequently, MLS is in the process of auditing its current inventory, the outcome of which will be to decide which courses/programs to “kill” and which to revamp and update. This revenue stream accounts for about \$3 million of MLS’ total budget of \$10 million for 2016-2017. Going forward, it is expected that the \$3 million will remain static despite overall MLS revenue growth because of the costs of open enrollment recruitment. Only those open enrollment offerings that can be aligned with specific professional development career paths (e.g., Executive Chief Learning Officer Certificate) and/or can be offered on an international scale, will be considered for marketing and promotion resources.
 - **Contract courses/programs** drawn from **off-the-shelf** inventory, bundled and offered in a **closed cohort** model to organizations. For example, offering the series of SHRM HR certification courses to SAIC, based on a total of 10 cohorts, 30 participants per cohort. These are primarily non-degree, not for credit programs and courses that come in as RFPs. This is the smallest of the revenue streams (circa \$500,000). Decision to respond to these types of RFPs are based on a cost-benefit analysis (what’s worth it for Mason).
 - **Customized** contract courses/programs offered in **closed cohort** model. Involves first conducting an organizational learning needs assessment with the Chief Learning Officer/Chief Executive Officer as the entrée into the organization. Based upon the organizational goals, objectives, and desired performance outcomes, MLS determines where in the university the expertise lies (which colleges/departments) to compile a

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multi-disciplinary (at least three colleges) package for that organization. The programs/courses are not-for-credit, non-degree and represent the greatest proportion of the MLS budget.

- **College-based closed cohort** programs that use MLS for registration, billing, and accounts receivables as well as administrative support. For example, Volgenau runs a closed cohort on cybersecurity with TASC/Engility, Inc.; CHASS' Center for the Advancement of Well-Being (CWB) offers the content for a closed cohort coaching program, but MLS does all the marketing and advertising, budget models. MLS takes 15% of the program revenue for its efforts.