

SOCIETY FOR LEARNING IN RETIREMENT

PLANNING FOR 2010

Adopted by the SLR membership at the February 19, 2005 Annual General Meeting

December 2006 revisions approved by the Board in red text.

Society for Learning in Retirement

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INTRODUCTION

The past year and a half has been an eventful period for Society for Learning in Retirement. During that time the Society has made a transition from Okanagan Institute for Learning in Retirement to SLR, sought and obtained status as a charitable organization for income tax purposes, and moved into newly renovated facilities in the Martin Avenue Community Centre. The range and number of programs offered expanded considerably while membership and participation increased significantly. Several new policies were developed and approved, the Society's website was redeveloped, and a Statement of Guiding Principles was formulated and adopted. With all of those changes having taken place, the Board decided that it was an opportune time to reflect on the organization's past and on its future development to ensure that it continues to fulfill its mission: *meeting the educational needs of retired persons in the Central Okanagan for the mutual benefit of the participants, volunteer leaders, and the broader community.*

The current document represents the outcome of a planning process which went from August, 2004 to January, 2005 and involved a considerable number of SLR's members and all of its Directors, with information received through responses to questionnaires and discussions with members and within the Board. It is organized around seven key issues; guiding principles, membership, programs, leadership, facilities, finances, communication, and social component. The format within each of the seven sections is basically the same, consisting of a brief assessment of current status, a summary of the input received from SLR members, and a statement of actions to be undertaken over the next few years. A description of the planning process is included as Appendix A.

GUIDING PRINCIPLES

A Statement of Guiding Principles was developed in 2003 during the transition from OILR to SLR. The intent was to preserve the key values and principles that had informed OILR's efforts and to ensure that they were inculcated in the new organization, Society for Learning in Retirement. The core principles address the benefits of learning in retirement to individuals and society, the collegial and friendly environment that is best suited for learning, the need to keep costs at a minimal level, the importance of responsiveness of learning activities to the needs and interests of the participants, the foundation formed by peer teaching and peer learning, and the need for member participation in all aspects of the organization.

Virtually all members believe that the Statement of Guiding Principles still accurately reflects their views regarding SLR's mission, values, and basic principles. As one member indicated, "The core principles are well-articulated, showing the benefits of learning in retirement. Based on present social and political conditions, they accurately reflect the views of the members." No one spoke critically of the Statement as a whole or of any specific values and principles within it, and no one had changes to suggest. For at least the next few years, therefore, the Society will:

1. Continue to adhere to its current mission, values, and basic principles as set forth in the Statement of Guiding Principles.

**Revised October-November, 2006 by the Board
Approved December 8, 2006 by the Board**

GUIDING PRINCIPLES

1. **Adhere to the current SLR mission, values, and basic principles as set forth in the Statement of Guiding Principles.**

MEMBERSHIP

Participants in SLR programs become members of the Society and pay an annual membership fee in addition to program fees. The number of members has increased in the past two years from about 350 to almost 550. While this represents substantial growth, it is still only a small fraction (about 2%) of the retired population of the Central Okanagan area. There were 27,300 persons aged 65 and over (18.5% of the total population) in the region in 2001, and this is expected to grow to 34,500 by 2011 and 60,300 by 2031.

For the most part, SLR members were in favour of future growth occurring "naturally" rather than on the basis of vigorous marketing. Only a few members suggested that there should be a limitation on the number of members, with various

respondents suggesting anywhere from 550 to 1,000. The main factors that will influence future growth were stated to be the availability of group leaders and the capacity of the facilities. Calculations by the Programs Committee indicate that the probable limit of the Martin Centre to accommodate SLR programs would be approximately 850 members, so that growth beyond that number would depend upon new or additional facilities being available.

SLR will undertake the following actions related to membership numbers:

2. Continue to provide information to relevant populations about the organization and its programs so that membership will be available to any retired persons who might be interested in participating.

3. Not artificially limit membership numbers unless necessitated by a lack of group leaders or classroom space.

4. Prepare for the possibility of increased membership related to the population surge of retired persons anticipated in the Central Okanagan over the next ten years.

5. Support the formation and development of organizations with similar purposes in other communities outside of the Central Okanagan rather than seek to expand its membership into other regions.

**Revised October-November, 2006 by the Board
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MEMBERSHIP

2. Provide information to relevant populations about SLR and its programs.

3. Limit membership numbers only if necessitated by a lack of group leaders or classroom space.

4. Prepare for increased membership numbers related to the continuing population surge of retired persons in the Central Okanagan.

5. Support the formation and development of organizations with similar purposes in other communities outside of the Central Okanagan.

PROGRAMS

The current Programs Committee is an energetic group which has extended the educational activities of the Society into new areas and formats. About 50 programs are offered each semester on a wide variety of topics, and programs are now being offered in three different weekday time slots, on weekends, in the spring, and at several locations in the community. The need for insurance liability coverage limits to some extent the types of programs that can be offered.

Members were very supportive of the expanded program offerings that have been developed over the past two years, and suggested a considerable number of new topics and subject areas that could be the basis for new programs in the future (See Appendix B). Almost any programs would seem to be appropriate provided that they met an educational need, that an appropriate group leader could be found, and that sufficient retirees were interested in participating. It was suggested that SLR continue to try out new approaches and scheduling patterns, and seek other facilities in the community where programs could be offered.

Over the next few years, SLR will implement several strategies related to its programs, including the following:

6. Continue to offer a diverse range of programs to meet the educational needs of retired persons in the Central Okanagan.
7. Identify the learning needs of retired persons using a number of different techniques such as questionnaire surveys of members and group leaders, biographical information from members, installation of a suggestion box, and group discussions.
8. Locate some programs outside the Martin Centre in such communities as Peachland, Westbank, Rutland, and Winfield as time and resources permit in order to relieve pressure on current facilities and to reach out to participants who find it difficult to travel to attend programs.
9. Experiment with formats and scheduling of programs by considering evening, weekend, and summer programs, varied lengths of programs and sessions, Internet discussion groups, field trips, and other innovative approaches.

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7. Identify the learning needs of retired persons using a number of different techniques such as questionnaire surveys, biographical information from members, discussions with group leaders, installation of a suggestion box, and group discussions.

8. Locate some programs outside the Martin Centre in other communities and facilities, including retirement centres, as time and resources permit in order to relieve pressure on current facilities and to reach out to participants who find it difficult to travel to attend.

9. Provide a variety of formats and program scheduling, including weekend and summer offerings. Vary the lengths of programs and number of sessions. Use Internet discussion groups, field trips, and other innovative approaches.

LEADERSHIP

SLR group leaders are all volunteers who are keenly interested in the subject areas they share with their participants. The learning activities they lead emphasize member participation, and considerable skill is required to provide appropriate guidance for the learning process. Peer teaching and peer learning have been hallmarks of OILR and SLR from the beginning and will doubtless continue to be throughout the lifespan of the Society. Learning from each other with the guidance of a peer is the very foundation of the Society's educational process.

Members who responded to the survey questionnaire and attend the forums were generally supportive of the group leaders and their efforts, and felt that the Society should recruit leaders more actively than currently. Members also felt that SLR could provide some in-service training, especially for newer leaders, and mainly to encourage more diversity in the processes used in the various programs. A number of suggestions were made to provide additional support to the group leaders including assignment of mentors, a one-day initiation program, and end-of-program evaluations. It was also noted that with the recent growth in membership, some clerical office support would be helpful to assist in the registration process, to respond to inquiries, and to help group leaders with their materials.

The Society will be undertaking the following activities with respect to improving leadership within the organization:

10. Seek and develop new group leaders through contacts with current group leaders and members while maintaining a watchful eye for potential group leaders in the community.

11. Develop and implement appropriate orientation and in-service opportunities for group leaders, especially those who are new to the process, to encourage diversity and flexibility in classroom methods.

12. Seek the advice of group leaders in developing support services and learning opportunities for them.

13. Provide funding in the SLR annual budget for a part-time clerical support position for the office.

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10. Seek new group leaders through contacts with current group leaders and members while watching for potential group leaders in the community.

11. Provide orientation and in-service opportunities for group leaders, especially those who are new to SLR, to encourage diversity and flexibility of teaching methods.

12. Seek the advice of group leaders in developing support services and learning opportunities for them.

FACILITIES

After seven years of moving from location to location around Kelowna, SLR moved into the Martin Avenue Community Centre in October, 2003 along with the Okanagan Boys and Girls Clubs. This has provided a new degree of permanency at favourable financial terms. SLR has three classrooms and an office together with access to other spaces in the Centre whenever they are needed and available, but there is no room within the Centre for additional core space for the Society.

Most members were pleased with the current facility and not anxious to move elsewhere; however, some felt that SLR should seek its own permanent facility as soon as possible. Those who did generally acknowledged that membership numbers and funding would be the key determinants in acquiring new and larger facilities. Most were doubtful that SLR could afford its own space without one or more partners, and several were adamant that the Society should not encourage any mortgage in acquiring new space. It was also noted that there are numerous

potential classrooms available for use in the community in seniors' centres, gated communities, churches, and elsewhere.

The Board believes that it would be unrealistic to expect that SLR would own its own permanent facility because of the high costs of constructing and operating such buildings and our own relatively inefficient pattern of use of facilities. It does believe, however, that appropriate partnership arrangements may be possible in conjunction with one or more other community groups and through contacts with municipal and provincial governments. Such arrangements would likely take several years to develop and implement. The Society will, therefore:

14. Establish a Facilities Task Force to seek partners and collaborators, to develop a long-range plan for SLR facilities, and to investigate potential funding arrangements.

15. Identify additional community facilities that can be used on a part-time, as-needed basis within the City of Kelowna and elsewhere in the Central Okanagan.

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13. Establish a Facilities Task Force to seek partners and collaborators, to develop a long-range plan for SLR facilities, and to investigate potential funding arrangements.

14. Identify additional Central Okanagan community facilities that can be used on a part-time, as-needed basis.

FINANCES

During its lifespan, OILR managed in most years to set aside a few thousand dollars in surplus funds which were intended for use in acquiring and improving a facility. The move to the Martin Avenue Community Centre required the expenditure of those accumulated funds. As a result, cash on hand was close to zero by the end of 2003 but the Society again started to accumulate funds by the end of 2004. SLR has obtained three grants in 2004 and has received numerous small donations from members, all of which augurs for a sound financial future.

Members were generally reluctant to contemplate increased membership and program fees, citing the economic needs of many retired people and that lower fees resulted in more members. Some indicated that they would be willing, and even expected, to pay small fee increases from time to time if needed to sustain programs.

Most members felt that SLR should seek external grants and donations wherever possible as long as there were no conditions to such funding that dictated programming.

For the next few years, SLR will:

16. Activate a Fundraising Committee to seek external grants and donations to support the Society's activities.

17. Maintain membership and program fees at as low a level as possible to encourage widespread participation.

18. Consider special funding needs related to the outcomes of the Facilities Task Force studies and activities.

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15. Activate a Fundraising Committee to seek external grants and donations to support SLR activities.

16. Maintain membership and program fees at as low a level as possible to encourage widespread participation.

17. Prepare for special funding needs related to the outcomes of the Facilities Task Force.

COMMUNICATION

The main vehicles that SLR uses to communicate with its members include a newsletter distributed three times per year and a website which is updated frequently.

Other forms of communication include the annual general meeting, and semi-annual luncheons intended primarily as social events. Almost 70% of SLR members have Internet access, and all of them receive the newsletter in the mail. Newsletter mailings also include some people who are not currently SLR members but have taken courses in the past.

Members were generally satisfied with the communication methods used by the Society. The level of satisfaction tended to be greater for those members who had computers and access to the SLR website, and a number of suggestions were

given for improving communication both by use of the Internet as well as the resources available at the Martin Centre.

For the next few years, SLR will focus on several specific forms of communication with members and will:

19. Continue to improve the SLR website and investigate the use of e-mail and other forms of communication via the Internet.

20. Improve the current resources for communicating with members including the bulletin board, suggestion boxes, more frequent newsletters, and using group leaders as communication channels more frequently.

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18. Improve the SLR website and use e-mail communication with members more effectively.

19. Use other media for communicating with members including the bulletin board, suggestion boxes, newsletters, and group leaders.

20. Promote SLR within the community

SOCIAL COMPONENT

Although the SLR mission focuses on education, the opportunity for social contact is important to many of our members both within the program groups and outside of them. These social contacts can be planned or spontaneous, and can take many different forms. Much social interaction takes place during coffee breaks, some groups develop their own social life, and two luncheons are held each year involving 160 to 200 members.

For the most part, members felt that the current level of social activities provided within SLR were appropriate and adequate. A number expressed the views that social activities were provided by other community organizations or were not part of SLR's mandate. The groups formed for educational programs were thought by some to comprise the basic social units of the Society, and that social activities should be the responsibility of those groups. Other comments noted the success of Friday brown-bag lunch meetings as social gatherings, while others indicated that coffee sessions could become more of a focal point for social

interaction. Some members indicated that the semi-annual luncheons were no longer the highlights that they once were.

For the next few years with regard to social activities, SLR will:

21. Emphasize the importance of program groups as the key social units within the Society and encourage group leaders to discuss with program participants their wishes regarding social activities within the group.

22. Offer activities such as brown-bag lunches that combine education with social interaction.

In conclusion, it is worth re-emphasizing that Society for Learning in Retirement is an organization devoted to meeting the educational needs of retired people in the Central Okanagan, and that it works through peer teaching and peer learning processes wherein members, group leaders, and directors all have important roles to play. Each role is critical to the success of the organization, and each member must be prepared to interchange their roles with others for its success to continue into the future. Hopefully this planning process will have reinforced those basic beliefs and values as well as reassured the members that the foundation established during the first decade of OILR and SLR will continue and evolve in its second decade.

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21. Emphasize program groups as the key social units in SLR. Encourage group leaders to discuss with program participants their wishes regarding social activities within the group.

22. Offer activities that combine education with social interaction.

APPENDIX A THE PLANNING PROCESS

Preliminary work on the long-range planning process began in the summer of 2004. The Board's initial discussion of how to involve members in the planning process led to the identification of a series of issues believed to be important to SLR members. These were subsequently translated into questions which formed the basis of a questionnaire which was reviewed at two Board meetings before final approval. Members were offered three options for response: a pen and paper reply to a written questionnaire, e-mail response to the questionnaire appearing on the SLR website, and attendance at one or three forums.

Questionnaires were distributed at the weekly meeting of each program in mid-October, with approximately four weeks allowed for responses. The questionnaire was posted on the website at the same time. A total of 68 members replied to the questionnaire in writing or by e-mail, and their responses were transcribed onto a 24 page document which was distributed to Board members. Some 70% of the respondents were female, which is the approximate percentage of SLR members who are female. The median length of SLR membership was five years with 11% being a member for less than two years while 20% had been members for nine or more years.

Three forums were held during the week of November 15, 2004 and these were attended by 43 people, 54% of whom were women. Each forum lasted about one hour and covered a wide range of topics, almost all of which also had been covered in the questionnaire.

At its December meeting, the Board reviewed the input from the members and had an initial discussion of goals and actions that needed to be taken in the next few years leading up to 2010. A report was drafted and discussed at the January Board meeting prior to final approval in February, 2005.

APPENDIX B **SUGGESTED BY MEMBERS**
PROGRAMS

Business Tours	Conversational Languages
Spanish	Kelowna's Multicultural Population
Flower Arranging	Skiing
Golf	Tai Chi
Science	Exploring Parapsychology
Health	Travelers' Geography
Nutrition	Travelers Share Experiences
Recreation	Computer Skills
Medieval Literature	History
Shakespeare	Photography
John Milton	Music
Modern Literature	Drama
The Bible as a Literary Work	Art
Good Girls/Bad Girls in Literature	World Markets and World Economies
Technological Advances	Medical Advances
The Kyoto Agreement	Humanities
Web-Page Design	Physical Fitness
Local Geology	Ancient World
Alternative Medicine	Bridge
Canadian History	Poetry

Rules of Order
Arts Overnights to Vernon,
Penticton
Good Grandparenting

Stress Reduction and
Relaxation
Beginners' French
Investment Club

Travel Club
Classical Composers

Cooking for Men

Communication Skills

Beginners' Latin
Recruiting Volunteers

“Experiment. It’s hard to please everyone.”

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