

February 28, March 1- 2, 2007

ITEM NO.: 134-1003-R0307

Approval of a Proposal to Approve the Osher Lifelong Learning Institute of The University of Montana

THAT:

In accordance with the Montana University System Policy, the Board of Regents of Higher Education authorizes The University of Montana to host, within Continuing Education, the Osher Lifelong Learning Institute of The University of Montana.

EXPLANATION:

Continuing Education of The University of Montana-Missoula is seeking approval of The Osher Lifelong Learning Institute of The University of Montana which offers non-credit, short courses for adults over the age of 55. The courses will be taught three times during the academic year: fall, winter and spring. The programs offered through the proposed institute are designed to help meet the informal educational needs of older adults and are not offered for credit. The Institute is supported by an external grant from the Bernard Osher Foundation and by self-support funding generated through memberships and program/course fees.

While Missoula maintains a large number of social service and health care programs for senior citizens, there are relatively few programs that have an education focus. An online search revealed ninety-five programs and resources, of which only three were related to education. Two of these focus on learning specific skills for people over age eighteen: the Dickinson Lifelong Learning Center offers training programs, most of which provide basic skills while others relate to hobbies such as photography or cooking; and the College of Technology, which offers a limited number of occupationally-focused courses for "non-traditional" students of all ages, although the vast majority of their students are under age fifty. There was only one academically oriented program available, Golden College, offered by The University of Montana. This relatively obscure program enables senior citizens to audit traditional credit courses with on-campus students.

There are few intellectually stimulating, academically-focused programs for individuals over the age of fifty in Missoula, and based on the numbers of students who have attended Institute courses from towns as far away as Hamilton and Superior, this need and lack of opportunity extends well into the state of Montana. In addition, enrollments in the first three terms of courses clearly indicate the need and the desire for programs for older adults in this area.

M O N T A N A B O A R D O F R E G E N T S
LEVEL II REQUEST FORM

Item No.: 134-1003-R0307 **Date of Meeting:** February 28, March 1-2, 2007
Institution: The University of Montana-Missoula
Program Title: The Osher Lifelong Learning Institute of The University of Montana

Level II proposals require approval by the Board of Regents.

Level II action requested (check all that apply): Level II proposals entail substantive additions to, alterations in, or termination of programs, structures, or administrative or academic entities typically characterized by the (a) addition, reassignment, or elimination of personnel, facilities, or courses of instruction; (b) rearrangement of budgets, cost centers, funding sources; and (c) changes which by implication could impact other campuses within the Montana University System and community colleges. Board policy 303.1 indicates the curricular proposals in this category:

- 1. Change names of degrees (e.g. from B.A. to B.F.A.)
- 2. Implement a new minor where there is no major;
- 3. Establish new degrees and add majors to existing degrees;
- 4. Expand/extend approved mission; and
- 5. Any other changes in governance and organization as described in Board of Regents' Policy 218, such as formation, elimination or consolidation of a college, division, school, department, institute, bureau, center, station, laboratory, or similar unit.

Specify Request:

The University of Montana-Missoula requests approval of a new institute, The Osher Lifelong Learning Institute of the University of Montana. The programs offered through the proposed Institute are designed to help meet the informal educational needs of older adults. The short courses offered in the program are not for credit. The Institute is supported by an external grant from the Bernard Osher Foundation and by self-supported funding generated through memberships and program/course fees.

M O N T A N A B O A R D O F R E G E N T S
NEW ACADEMIC PROGRAM PROPOSAL SUMMARY

Item No.: 134-1003-R0307
Institution: The University of Montana-Missoula
Program Title: The Osher Lifelong Learning Institute of The University of Montana

1. How does this program advance the campus' academic mission and fit priorities?

The Mission Statements for both The University of Montana (UM) and The University of Montana-Missoula (UM-M) include statements about the importance of supporting programs such as The Osher Lifelong Learning Institute, as per the following, the first from UM: "The dedication to education for and throughout life reflects the commitment to service learning and community building on and off the campuses." UM-M's mission statement indicates: "Through its programs and the activities of faculty, staff, and students, The University of Montana-Missoula provides basic and applied research, technology transfer, cultural outreach, and service benefiting the local community, region, state, nation and the world." These statements specifically support the founding of the Institute.

2. How does this program fit the Board of Regents' goals and objectives?

The Regents' strategic plan for 2006-2010 includes three specific goals with the main focus on traditional college age students. Of the three, however, one is more relevant to this proposal: "Increase the overall educational attainment of Montanans through increased participation, retention and completion rates in the Montana University System." While not directly addressing the educational needs of older adults, it can be assumed that lifelong learning is within the scope of this goal.

3. How does this program support or advance Montana's needs and interests?

Montana is experiencing the aging of its population and this trend will continue to accelerate as larger numbers of older people retire to Montana. Since 1980, the population aged 60 and over has grown from 119,240 to 158,894 in 2000. [Montana Department of Labor and Industry, Workforce Services Division, Research and Analysis Bureau, June 2001] According to the Montana Census and Economic Information Center, in the next 30-40 years we will continue to have increases in the numbers of older persons. This growth presents challenges as well as opportunities for Montanans in planning to meet the needs of an aging society.

The Institute has been designed to help meet the informal educational needs of older adults. The early successes of the Institute speak to the fact that there is genuine interest and need in the Missoula region for the types of programs offered.

4. How will this program contribute to economic development in Montana? (Note projected annual economic impact both regionally and statewide.)

The impact of the Institute on economic development within Montana would be minimal since it's only goal is to provide non-credit educational programs to older adults.

5. What is the program's planned capacity?

• Break-even point?	The goal for the Institute is to have 500 members by September of 2009
• Enrollments / year?	NA
• Graduates / year?	NA
• MT jobs / year?	NA

6. Resource Allocation:

• Total program budget?	\$165,000 X 3 years
• Faculty FTE?	NA
• Staff FTE?	.50

7. Does this program require new resources? Yes No

If yes, what is the amount? \$ NA

8. How will the campus fund the program?

The Institute is funded by a grant from the Bernard Osher Foundation for \$100,000 per year for three years with the probable granting of a \$1,000,000 endowment to sustain the Institute in the future. In addition, the Institute will have designated funding made available through memberships and course fees.

9. If internal reallocation is necessary, name the sources.

No internal reallocation required.

PROPOSAL

I. Objectives and Need

1. Description of program

The purposes of the Institute are to promote lifelong learning and personal growth for adults fifty-five and over, as well as to provide accessible programs that address their continuing intellectual needs. Our goal is to create an innovative learning environment so that older adults from all backgrounds and levels of education are able to pursue learning simply for the joy of learning.

The program is structured around the offering of a diverse collection of non-credit short courses at regular intervals during the year, including six-week terms in the fall, winter and spring. Brochures outlining the programs offered to date are available. Currently, all courses are offered on Fridays at times designed to enable students to enroll in more than one course. The length of each class meeting is dependent upon the subject matter, however, most are offered for one and a half hour periods utilizing a seminar format. The focus is on academic programs drawing on the talents of active and retired faculty from The University of Montana.

2. Documented Need for the Program

While Missoula maintains a large number of social service and health care programs for senior citizens, there are relatively few programs that have an education focus. Indeed, an online search revealed ninety-five programs and resources, of which only three were related to education. Two of these focus on learning specific skills for people over age eighteen: the Dickinson Lifelong Learning Center offers training programs, most of which provide basic skills while others relate to hobbies such as photography or cooking; and the College of Technology, which offers a limited number of occupationally-focused courses for "non-traditional" students of all ages, although the vast majority of their students are under age fifty. There was only one academically oriented program available, Golden College, offered by The University of Montana. This relatively obscure program enables senior citizens to audit traditional credit courses with on-campus students.

There is a paucity of intellectually stimulating, academically-focused programs for individuals over the age of fifty in Missoula, and based on the numbers of students who have attended Institute courses from towns as far away as Hamilton and Superior, this need and lack of opportunity extends well into the state of Montana.

Enrollments in the first three terms of courses clearly indicate the need and the desire for programs for older adults in this area.

3. Additional Courses

Courses offered by the Institute are non-credit and based on older-adult student needs. These will vary in terms of content and instruction, but do not require the same kinds of approvals as courses carrying credit.

II. Adequacy of Current Resources, Accreditation and Assessment

Faculty or instructors for the Institute are active or retired UM faculty or community members who are knowledge experts in their field. These individuals are paid a small sum to reimburse them for their planning and teaching time. For active UM faculty members, this is paid extra-to-load.

The Institute is an externally funded program, coupled with membership fees and tuition, thus, no internal funding is required. The annual and three-year budgets for the Institute project that the revenues generated by these three sources are adequate to cover all associated costs with the program.

Because the Institute is a non-credit, informal program for older adults, it is not subjected to traditional accreditation, per se. An annual report must be submitted to the Bernard Osher Foundation which describes the programs offered, the numbers of memberships, the numbers of course enrollments as well as the results of course evaluations.

In terms of assessment, each course is evaluated with a standard form that was developed especially for the Institute and is available upon request. Also, each faculty member or instructor is interviewed related to a

number of dimensions of his/her course. Institute members are asked to comment, on numerous occasions, about many aspects of the Institute to enable continuous improvement of services. The annual report for the Osher Foundation also serves as an assessment instrument.

III. Additional Faculty Requirements

No additional faculty members are required.

IV. Impact on Facilities

There is no impact on facilities in that the courses are held, primarily, within the Continuing Education building, which is a bonded facility requiring rental income to cover the bond payment. As the Institute grows, additional meeting places will be required, however, there are sufficient funds to rent or lease rooms on an "as needed" basis.

V. Cost Analysis

There are no direct costs associated with the Institute to The University of Montana. The associated costs of instruction, room rental, marketing and staffing are covered through three sources of funding: the Osher grant, memberships and course tuition. A detailed budget is appended. [Appendix A]

VI. Enrollment Impact

There is no impact on student enrollments associated with this Institute.

VII. Relationship to Other Campus Programs

The relationship the Institute has with other campus programs is primarily focused on marketing, engaging interested faculty as instructors and for identifying topics that might be of interest to older adults. Since the intent of the Institute is very different from other campus programs, there is no formal relationship, however.

VIII. Relationship to Other Institutions

Since the Institute is the only program of its kind in the State of Montana, there should be no impact upon other UM system or the Montana University System schools.

IX. Process Leading to Submission of Proposal

This Proposal was reviewed and approved by the affected departments:

Department Name: Continuing Education

Date: November 15, 2006

In addition the Deans of the following Schools/Colleges reviewed and approved the Proposal:

Dean of Continuing Education Sharon E. Alexander

Date: November 15, 2006

Associate Provost Arlene Walker Andrews

Date: November 15, 2006

Interim Provost/President George M. Dennison

Date: November 15, 2006

The proposal was reviewed and approved by the Faculty Senate at the University of Montana

[No outside consultants were employed for the development of this proposal.]

**APPENDIX A
BUDGET ANALYSIS**

Campus: The University of Montana-Missoula

Proposed Program: The Osher Lifelong Learning Institute of The University of Montana

	Year 1	Year 2	Year 3	Year 4	Year 5
Estimated Enrollment					
FTE Enrollment	NA	NA	NA	NA	NA
Estimated Incremental Revenue					
Current General Operating Funds	0	0	0	NA	NA
State Funding for E. G.	0	0	0	NA	NA
Tuition Revenue [A-C]	0	0	0	NA	NA
Program/Course Fees	57,000	65,000	70,000	*	*
External Funds	100,000	100,000	100,000	*	*
Membership Fees	8,000	10,000	15,000	*	*
TOTAL	165,000	175,000	185,000	*	*
Est. Incremental Revenue					
Estimated Incremental Expense					
Personal Services					
Faculty	66,600	75,000	80,000	*	*
Other Staff	15,000	18,000	19,000	*	*
Operating Expenses	78,000	80,000	82,000	*	*
Equipment	0	0	0	*	*
Start-Up Expenditures	0	0	0	*	*
TOTAL	159,600	173,000	181,000	*	*
Est. Incremental Expense					
Estimated Revenues Over [Under] Expenditures	5,400	2,000	4,000	*	*

* = Information unavailable at this time as the \$1,000,000 endowment will change the budget model; it is anticipated that investment funds will cover expenses when added to program/course fees and membership fees