

## LEVEL II MEMORANDUM

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**DATE:** August 28, 2020

**TO:** Chief Academic Officers, Montana University System

**FROM:** Brock Tessman, Deputy Commissioner for Academic, Research, and Student Affairs

**RE:** September 2020 Level II Proposals

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The campuses of the Montana University System have proposed new academic programs or changes under the Level II approval process authorized by the Montana Board of Regents. The Level II proposals are being sent to you for your review and approval. If you have concerns about a particular proposal, you should share those concerns with your colleagues at that institution and try to come to some understanding. Issues not resolved should be submitted in writing to OCHE by noon on Friday, September 4<sup>th</sup>. If no concerns are received, OCHE will assume that the proposals have your approval.

### Level II Items

#### **Montana State University Bozeman:**

- Request to establish the Osher Lifelong Learning Institute at Montana State University  
[Item #190-2004-R0920](#) | [Center & Institute Form](#) | [Intent to Plan](#) | [Public Comment](#)  
**\*\*Note: In accordance with BOR Policy 1004.1 "Naming of Buildings", MSU provided an opportunity for the public to comment on the proposed name of this academic unit. A summary of the comments received is included with this item.**

**Montana Board of Regents**  
**ACADEMIC PROPOSAL REQUEST FORM**

September 2020

**ITEM 190-2004-R0920**

**ITEM TITLE Request for authorization to establish the Osher Lifelong Learning Institute at Montana State University**

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Institution: **Montana State University**

CIP Code: \_\_\_\_\_

Program/Center/Institute Title: **Osher Lifelong Learning Institute at Montana State University**

Includes (please specify below): Face-to-face Offering: \_\_\_\_\_ Online Offering: \_\_\_\_\_ Blended Offering: \_\_\_\_\_

Options: \_\_\_\_\_

**Proposal Summary [360 words maximum]**

Montana State University proposes to establish the “Osher Lifelong Learning Institute at Montana State University.” The mission of the Institute states: “As part of Montana’s land-grant university, the Osher Lifelong Learning Institute at Montana State University provides intellectually stimulating programs for adults 50+ years of age that foster lifelong learning and community engagement.”

MSU has served this population for over 15 years through a non-credit program called Wonderlust. Based on the quality reputation of this program, MSU was invited by the Bernard Osher Foundation to submit a proposal to become the 124<sup>th</sup> Osher Lifelong Learning Institute (OLLI) in the United States. This proposal was accepted by the Osher Foundation in July 2019, with initial funding provided to strengthen the program. The “Osher Lifelong Learning Institute at Montana State University” name is an Osher Foundation requirement. The successful MSU Wonderlust program will become the “Osher Lifelong Learning Institute at Montana State University.” It will be administered through MSU Academic Technology and Outreach, an academic unit reporting up through the MSU Executive Vice President for Academic Affairs and Provost.

OLLI at MSU will offer courses, workshops, seminars, travel programs and social opportunities facilitated by MSU faculty, staff and students, as well as the significant community expertise in the Gallatin Valley. In addition, OLLI at MSU will provide opportunities for volunteer participant engagement in the planning, operations and implementation of the program. The program currently has over 600 members with active member participation in the Advisory Council, executive committee, and other program planning and curriculum committees.

The Institute will be supported through membership dues, class registration fees, and private contributions including the Osher Foundation grant. We anticipate an endowment from the Osher Foundation at the beginning of 2021 following successful completion of the metrics outlined in the grant proposal.

The Bernard Osher Foundation established an Osher Lifelong Institute at the University of Montana (MOLLI) which was approved by the BOR in 2007. UM is supportive of a second OLLI at Montana State University and provided a letter of support to the Bernard Osher Foundation for the MSU proposal. We anticipate many opportunities to collaborate to better serve this demographic across Montana.

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**ATTACHMENTS**

Intent to Plan  
Center Proposal form

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Montana Board of Regents  
ACADEMIC PROPOSAL REQUEST FORM

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Please mark the appropriate type of request and submit with any additional materials, including those listed in parentheses following the type of request. For more information pertaining to the types of requests listed below, how to complete an item request, or additional forms please visit <http://mus.edu/che/arsa/academicproposals.asp>.

**A. Level I:**

**Campus Approvals**

- 1a. **Placing a postsecondary educational program into moratorium** (Program Termination and Moratorium Form)
- 1b. **Withdrawing a postsecondary educational program from moratorium**
2. **Establishing, re-titling, terminating or revising a campus certificate of 29 credits or less**
3. **Establishing a B.A.S./A.A./A.S. area of study**
4. **Offering an existing postsecondary educational program via distance or online delivery**

**OCHE Approvals**

5. **Re-titling an existing postsecondary educational program**
6. **Terminating an existing postsecondary educational program** (Program Termination and Moratorium Form)
7. **Consolidating existing postsecondary educational programs** (Curriculum Proposal Form)
8. **Establishing a new minor where there is a major or an option in a major** (Curriculum Proposal Form)
9. **Revising a postsecondary educational program** (Curriculum Proposal Form)
10. **Establishing a temporary C.A.S. or A.A.S. degree program** *Approval limited to 2 years*

**B. Level II:**

1. **Establishing a new postsecondary educational program** (Curriculum Proposal and Completed Request to Plan Form)
2. **Permanent authorization for a temporary C.A.S. or A.A.S degree program** (Curriculum Proposal and Completed Request to Plan Form)
3. **Exceeding the 120-credit maximum for baccalaureate degrees** *Exception to policy 301.11*

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**X** **4. Forming, eliminating or consolidating an academic, administrative, or research unit** (Curriculum or Center/Institute Proposal and completed Request to Plan, except when eliminating or consolidating)

\_\_\_\_\_

**5. Re-titling an academic, administrative, or research unit**

\_\_\_\_\_

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**RESEARCH CENTER AND INSTITUTE PROPOSAL FORM**

Research Centers and Institutes differ from one another in focus, scope, and staffing, but each contributes in unique ways to the common goals of expanding knowledge, generating new discoveries and/or having a positive impact on society through informing policy and systemic change. Communities of researchers and staff in Research Centers and Institutes provide a stimulating environment that encourages early researchers and challenges experienced researchers. Research Centers and Institutes also contribute to the education and training of the researchers of the future by serving as learning environments for students. Interdisciplinary collaboration is promoted by Research Centers and Institutes both within the Institution and among MUS Institutions. Research Centers and Institutes do not provide didactic coursework, confer academic degrees or academic certificates or require accreditation by external accrediting bodies. Research Centers and Institutes frequently provide a portal for obtaining external funding in response to federal and/or state research priorities. As such, apparent duplication of mission between MUS research centers and institutes is not generally problematic as with academic programs due to the different sources of funding

**1. State the proposed Institute/Center's name and purpose.**

Montana State University proposes to establish the "Osher Lifelong Learning Institute at Montana State University."

The purpose of the Osher Lifelong Learning Institute at Montana State University is to create a community of lifelong learners affiliated with Montana State University and provide non-credit programs, in a variety of formats, to meet the lifelong learning needs of individuals 50 years of age and older. MSU has served this population over the last 15 years through a non-credit program called Wonderlust. Based on the quality reputation of this program, MSU was invited by the Bernard Osher Foundation to submit a proposal to become the 124<sup>th</sup> Osher Lifelong Learning Institute. This proposal has now been accepted by the Osher Foundation, with initial funding provided to establish/enhance the program. The "Osher Lifelong Learning Institute at Montana State University" name is an Osher Foundation requirement. The current MSU Wonderlust program will become the Osher Lifelong Learning Institute at Montana State University. It will be administered through MSU Academic Technology and Outreach, an academic unit reporting up through the MSU Executive Vice President for Academic Affairs and Provost.

OLLI at MSU will offer non-credit academic courses, workshops, seminars, travel programs and other learning and social opportunities facilitated by MSU faculty, staff and students, as well as the significant community expertise in the Gallatin Valley.

**2. A comprehensive statement of the Institute/Center's mission and its relationship to the University mission.**

**A. State the Institute/Center's mission.**

The mission of the Institute is as follows: "As part of Montana's land-grant university, the Osher Lifelong Learning Institute at Montana State University provides intellectually stimulating programs for adults 50+ years of age that foster lifelong learning and community engagement."

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**B. Identify the Institute/Center's goals and objectives.**

The goal and objective for the Osher Lifelong Learning Institute (OLLI) at Montana State University is to provide a wide variety of high-quality learning opportunities for individuals 50 years of age and older. The OLLI at MSU will expand on the original Wonderlust program, creating a community of learners affiliated with MSU, by engaging them in the planning, development and delivery of programs for learners age 50+ under a common MSU umbrella.

The Institute will expand both the program membership and the number and types of class offerings, assess needs in the community, engage local members in program committees to actively advise and support the Institute, and engage current and retired MSU faculty and staff in sharing their expertise and helping to guide the work of the Institute.

**C. What specific need is being responded to in developing the proposed Institute/Center?**

Montana State University and the community of Bozeman have a unique opportunity to significantly advance lifelong learning by establishing an Osher Lifelong Learning Institute. Bozeman and the Gallatin Valley seem to attract a certain kind of resident – people who seek adventure and welcome learning. MSU students certainly play a large role in that population, however, there is a growing proportion of the population that is no longer college-aged, but still eager to learn.

In May 2018, the U.S. Census Bureau reported the Bozeman Micropolitan Statistical Area, which includes all of Gallatin County, as the fastest-growing of its size in the nation for the second year in a row. In January 2018 and 2019 the same area was ranked by POLICOM, a Florida-based think tank, as the strongest economy in the U.S., defined by the group as the “long-term tendency for an area to consistently grow in both size and quality.”

Research demonstrates that active lifelong learning is a critical factor in healthy aging. The long-term success of the MSU Wonderlust program is evidence of the need for educational programs for this demographic. As a self-support membership program, MSU Wonderlust has over 600 annual members and courses fill to capacity. There is reason to believe that this demand will continue to grow and the Osher Foundation funding support, as well as the operational resources from the national network of Osher Institutes, will significantly strengthen the program in this rapidly changing community.

**D. Describe how the Institute/Center benefits the department, college, or institution.**

Academic departments and colleges at Montana State University strongly support the program. Many faculty contribute as course instructors and some serve on the advisory committee. The current Wonderlust program (future Osher institute) provides a conduit for high quality academic outreach and service to the community. Faculty often comment on how much they enjoy teaching in the program because of the wealth of knowledge that this demographic brings to enhance the learning experience. The program provides current and retired faculty with the opportunity to share their extensive knowledge and teaching skills by offering courses to a new group of learners. The Institute will also benefit traditional students, engaging them in intergenerational programs and providing opportunities to interact with active members of the local community.

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**E. Describe the institute/Center's relationship to the University mission.**

The MSU Strategic Plan "Choosing Promise" defines the University mission as follows: "As the state's land-grant university, Montana State integrates education, creation of knowledge and art and service to communities." The plan identifies 3 areas of "intentional focus." The 3<sup>rd</sup> intentional focus area is "Expanding Engagement: Expand Mutually Beneficial and Responsive Engagement for the Advancement of Montana." The Osher Lifelong Learning Institute at Montana State University directly addresses this intentional focus area. Given this emphasis in the strategic plan, we are well positioned to establish a the Osher Institute of Lifelong Learning at Montana State University as a high-profile program of MSU. This new institute exemplifies the spirit of the Carnegie Classification for Community Engagement, which MSU holds, by including diverse representation from our community constituents in defining the goals, planning, and operations of the Institute.

**3. Briefly describe the Institute/Center's anticipated activities.**

Based on past activity, we anticipate offering approximately 40 courses/programs per semester. There are 5 primary focus areas: 1) Courses, which vary in length from 4-6 weeks; 2) Side Trips – two-hour programs in a specific area of interest; 3) Community Events offered in collaboration with the public libraries in our sister communities of Belgrade and Livingston; 4) a monthly Friday Forum, offered free to the community, that addresses timely topics related to local, city, county, state, national, and international issues; and 5) Preludes and Performances, featuring visual, musical, theatrical, and performing arts. In addition, we anticipate offering a guided, small group discovery travel series (within Montana) co-sponsored by the MSU Retiree Association, as well as "How It's Made in Montana" tours of local industries. The early response to these travel programs has been very positive.

In addition to courses, workshops, and seminars, the institute anticipates offering social opportunities (receptions, meals, recreation) around a specific learning theme in order to establish a community of learners as well as provide members with opportunities to get better acquainted with faculty and instructors.

The courses/programs range from an event that takes place in a single day lasting from 1 to several hours to classes that meet for 1-2 hours each week over several weeks. The length of the course depends on the content and depth of material. Varying the length and type of course provides maximum opportunities for adult participation by meeting various lifestyle needs

**A. Identify faculty expertise available for participation in the Institute/Center's activities.**

Faculty from every college at MSU have participated in teaching courses, workshops, and field trips through the Wonderlust program and we anticipate this involvement will grow. The faculty are very supportive of the program and are engaged with the program curriculum committee in identifying course topics, as well as helping to identify individuals with expertise that are interested in teaching in the program. In addition to current and retired faculty and staff, the Bozeman community is rich with individuals who have significant expertise in a variety of academic areas, and these individuals are enthusiastic to serve as course instructors and become part of an MSU program.

**B. Which departments on campus will be involved and how will the Institute/Center contribute to the academic programs of the institution?**

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Departmental involvement will vary depending on the interest of the department and faculty, as well as needs analysis and interest of the program membership. It will vary from semester to semester depending on the course content. There are opportunities for faculty to be part of the advisory council or various planning and development committees. The Institute will provide departments with an organized structure for providing outreach and service to the community, as well as ways to share the results of their research with the broader public.

**4. Identify the organizational structure of the Institute/Center within the institution.**

The institute is housed within MSU Academic Technology and Outreach (ATO). The ATO director reports to the Assistant Provost for Academic Affairs. ATO initiates, supports, and coordinates outreach and non-credit initiatives for colleges and departments across campus and has the experience and resources to support the Osher Institute.

**A. Identify all agencies, organizations and/or institutions that will be involved.**

Montana State University is the primary institution involved. Over the past 15 years, the MSU Wonderlust program has established relationships with local businesses, MSU Extension, Alumni Foundation, and Retired Faculty Association, as well as with the Bozeman, Belgrade, and Livingston libraries. As the Osher Lifelong Learning Institute, we will continue to build positive relationships with local and state entities that support lifelong learning for older adults.

**B. Identify advisory council information**

The program is currently guided by a member Advisory Council consisting of a chair, vice-chair, and past-chair, committee chairs, and other volunteer members including numerous retired MSU faculty and staff. The director of MSU Wonderlust and other MSU Academic Technology and Outreach leadership, the Vice President of Alumni Engagement and the Executive Director of MSU Extension are also members of the Advisory Council. Guidelines for the OLLI at MSU operations and council membership will be defined by an operations and procedure manual for the Osher Lifelong Learning Institute at MSU

**5. Identify first year and continuing finances necessary to support the Center/Institute, including the sources of funding.**

The Wonderlust program has operated on an externally funded basis since 2002 and as a self-supporting program of MSU since 2017. Revenue consists of membership dues, course registration fees, private contributions, and the more recent Osher grant funding. Annual revenue and expenditures are projected at approximately \$123k and the costs will be covered by program revenue including annual membership dues, course registration fees and the Osher grant award. Beginning July 1, 2019, the Bernard Osher Foundation granted \$100,000 to support a 1.0 FTE director position plus some operational costs to support program growth. Revenue and expenditures are based on over 10 years of financial data.

In December 2020, the Bernard Osher Foundation will review the current status of the program goals and metrics outlined in the grant proposal and consider a \$1M endowment to provide ongoing support for the program. We are confident that MSU will meet the metrics defined in the Osher Foundation proposal. Revenue from a "bridge" grant and the endowment are expected to cover some of the program costs.

**A. Will additional faculty and other resources be required to implement this Center/Institute? If yes, please describe the need and indicate the plan for meeting this need.**

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No new faculty or resources are required to implement the Osher Lifelong Learning Institute at Montana State University. The initial Osher Foundation grant, received July 1, 2019, provided support to create the Institute and a Director position. Previously the Wonderlust program has not had the resources for a dedicated staff person. We believe that this position will be instrumental to growing and supporting the Institute. Additional staff and operational resources already exist within the ATO budget to support the program.

**B. Are other, additional resources required to ensure the success of the proposed Center/Institute? If yes, please describe the need and indicate the plan for meeting this need.**

As a financially self-supporting program with demonstrated success, no additional resources will be required. Once the program meets the metrics outlined in the Osher Foundation grant proposal, there is an opportunity for a \$1M endowment from the Osher Foundation. The earnings from this endowment will be used to provide ongoing support for the Institute. In addition to the endowment earnings, program costs, including institutional overhead, will be covered by the self-support funding model established for the program

**6. Describe other similar Centers/Institutes or research capacities in the state and surrounding region.**

The University of Montana has a similar program funded by the Osher Foundation. The Montana Osher Lifelong Learning Institute (MOLLI) was approved by the Montana BOR in 2007. There are 123 other OLLI programs throughout the United States. In addition, the Osher Foundation supports an OLLI National Resource Center at Northwestern University that provides guidance, expertise, and resources to all of the Osher Lifelong Learning Institutes. There are no other centers or institutes in the state that specifically serve the educational lifelong learning needs of adults 50+ years of age. The Osher Foundation is a national leader in promoting lifelong learning programs for this demographic.

**A. Describe the relationship between the proposed Center/Institute and any similar Centers/Institutes, programs, or research capacities within the Montana University System**

The Montana Osher Lifelong Learning Institute (MOLLI) has been very supportive of this request and encouraged the Osher Foundation in a letter of support to fund a second institute in Montana. Given Montana's aging demographics and dispersed population, two OLLI programs in this state will allow us to work together to bring lifelong learning programs for people over 50 years of age to parts of the state beyond Missoula and Gallatin Valley. The expertise from both institutions will enable us to establish a wider range of course topics for members of both programs. The directors of both programs have engaged in planning and discussions about opportunities to work together to strengthen both programs and better serve the people of Montana.

**C. In cases of substantial duplication, explain the rationale for the proposed Center/Institute.**

We are not aware of any duplication.

**7. Assessment: How will the success of the center/institute be measured?**

**Success of the Osher Lifelong Learning Institute at MSU will be measured by:**

- a) Membership growth

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- b) Financial sustainability
- c) Increased community participation in planning and activities
- d) Recognition by the Osher Foundation with a \$1M endowment

**8. State the internal campus review and approval process which has occurred prior to submission to the Commissioner's Office. Indicate, where appropriate, involvement by faculty, students, community members, professional constituencies, etc.**

This proposal has followed the required internal campus review and approval process. Students and faculty involved in the program for many years are highly supportive. The program Advisory Council and Executive Committee which includes community members were involved in the development of the proposal to the Osher Foundation and strongly support the initiative to create the Osher Lifelong Learning Institute at Montana State University.

Montana University System  
INTENT TO PLAN FORM

Program/Center/Institute Title: Osher Lifelong Learning Institute at Montana State University

Campus, School/Department: Montana State University

Expected Submission Date: \_\_\_\_\_

Contact Name/Info: Kim Obbink

To increase communication, collaboration, and problem-solving opportunities throughout the MUS in the program/center/institute development process, please complete this form not more than 18 months in advance of the anticipated date of submission of the proposed program/center/institute to the Board of Regents for approval. The completed form should not be more than 2-3 pages. For more information regarding the Intent to Plan process, please visit <http://mus.edu/che/arsa/academicproposals.asp>.

**1) Provide a description of the program/center/institute.**

The purpose of the Osher Lifelong Learning Institute at Montana State University is to create a community of lifelong learners affiliated with Montana State University and provide non-credit programs in a variety of formats to meet the lifelong learning needs of individuals 50 years of age and older. MSU has served this population over the last 15 years through a non-credit program called Wonderlust. Based on the quality reputation of this program, MSU was invited by the Bernard Osher Foundation to submit a proposal to become the 124<sup>th</sup> Osher Lifelong Learning Institute. This proposal has now been accepted by the Osher Foundation, with initial funding provided to establish the program. The "Osher Lifelong Learning Institute at Montana State University" name is an Osher Foundation requirement for future funding. The current Wonderlust program will become the Osher Lifelong Learning Institute at Montana State University. It will be administered through MSU Academic Technology and Outreach, an academic unit reporting up through the MSU Executive Vice President for Academic Affairs and Provost.

OLLI at MSU will offer non-credit academic courses, workshops, seminars, travel programs and other learning and social opportunities facilitated by MSU faculty, staff and students, as well as the significant community expertise in the Gallatin Valley.

**2) Describe the need for the program/center/institute. Specifically, how the program/center/institute meets current student and workforce demands. (Please cite sources).**

Montana State University and the community of Bozeman have a unique opportunity to significantly advance the current MSU Wonderlust lifelong learning program by establishing an Osher Lifelong Learning Institute at MSU. Bozeman seems to attract a certain kind of resident – people who seek adventure and welcome learning. MSU students certainly play a large role in that population, however, there is a growing proportion of the population that is no longer college-aged, but still eager to learn.

As a self-supported membership program, MSU Wonderlust has over 570 annual members and growing, and most courses fill to capacity. Based on demographics alone, there is reason to believe that this demand will only continue to grow. According to the Prospera 2019 Economic Profile, "Gallatin County projects a 585% growth in the 65 and older age cohort representing a large population shift in the next 30 years"

The Osher Foundation funding support, as well as the resources from the national network of Osher Institutes, will enable the OLLI program to sustainably expand to meet the needs of this rapidly growing community and retiree audience.

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**3) Describe how the program/center/institute fits with the institutional mission, strategic plan, and existing institutional program array.**

The MSU Strategic Plan "Choosing Promise" defines the University mission: "As the state's land-grant university, Montana State integrates education, creation of knowledge and art and service to communities." The plan identifies 3 areas of "intentional focus." The 3<sup>rd</sup> intentional focus area is "Expanding Engagement: Expand Mutually Beneficial and Responsive Engagement for the Advancement of Montana."

The Osher Lifelong Learning Institute at Montana State University is an exemplary program that addresses this intentional focus. Given this emphasis, we are well positioned to transition MSU Wonderlust to the Osher Institute of Lifelong Learning at Montana State University as a high-profile program of Montana State University. This new institute recognizes the spirit of the Carnegie Classification for Community Engagement by including diverse representation from our community constituents in defining the goals, planning, and operations, of the Institute.

**4) Describe how the program/center/institute overlaps, complements, or duplicates existing efforts in the MUS. Describe efforts that will be made to collaborate with similar programs at other institutions. If no efforts will be made, please explain why.**

The Montana Osher Lifelong Learning Institute (MOLLI) at the University of Montana was established in 2008. MOLLI has been very supportive of this request and encouraged the Osher Foundation to fund a second institute in Montana. Given Montana's aging demographics and dispersed population, having two OLLI programs in the state will allow us to work together to bring lifelong learning programs for people over 50 years of age to parts of the state beyond Missoula and Gallatin Valley. In addition, the expertise from both institutions will enable us to establish a wider range of course topics for members of both programs. The directors of the Missoula and Bozeman Lifelong Learning organizations have engaged in planning and discussions about how to work together to strengthen both programs and better serve the people of Montana.

Signature/Date

College/School Dean:

Chief Academic Officer: *R. L. McKenna 2-18-20*

Chief Executive Officer: *Jeffrey Adams Feb 18 2020*

Flagship Provost\*: *R. L. McKenna 2-18-20*

Flagship President\*: *Jeffrey Adams Feb 18, 2020*

\*Not applicable to the Community Colleges.

Date of Final Review:

**When submitting the proposal to the BOR, include this signed form with the Level II request.**

## Osher Lifelong Learning Institute (OLLI) at Montana State University

### Level II Request and Naming Process Summary

September 4, 2020

Montana State University proposes to establish the “Osher Lifelong Learning Institute at Montana State University.” The purpose of the Osher Lifelong Learning Institute at MSU is to create a community of lifelong learners affiliated with Montana State University and provide non-credit programs, in a variety of formats, to meet the lifelong learning needs of individuals 50 years of age and older. MSU has served this population over the last 15 years through a non-credit program called Wonderlust. Based on the quality reputation of this program, MSU was invited by the Bernard Osher Foundation to submit a proposal to become the 124<sup>th</sup> Osher Lifelong Learning Institute. This proposal has now been accepted by the Osher Foundation, with initial funding provided to establish/enhance the program. The “Osher Lifelong Learning Institute at Montana State University” name is an Osher Foundation requirement. The current MSU Wonderlust program will become the Osher Lifelong Learning Institute (OLLI) at MSU. It will be administered through MSU Academic Technology and Outreach, an academic unit reporting up through the MSU Executive Vice President for Academic Affairs and Provost.

OLLI at MSU will offer non-credit academic courses, workshops, seminars, travel programs and other learning and social opportunities facilitated by MSU faculty, staff and students, as well as the significant community expertise in the Gallatin Valley. The mission of the Institute is as follows: “As part of Montana’s land-grant university, the Osher Lifelong Learning Institute at Montana State University provides intellectually stimulating programs for adults 50+ years of age that foster lifelong learning and community engagement.”

The OLLI at MSU will expand on the original Wonderlust program, creating a community of learners affiliated with MSU, by engaging them in the planning, development, and delivery of programs for learners age 50+ under a common MSU umbrella. The Institute will expand both the program membership and the number and types of class offerings, assess needs in the community, engage local members in program committees to actively advise and support the Institute, and engage current and retired MSU faculty and staff in sharing their expertise and helping to guide the work of the Institute.

#### **Process:**

**April 2019:** MSU was invited to submit a proposal to the Bernard Osher Foundation to establish an Osher Lifelong Learning Institute (OLLI) at Montana State University.

**July 1, 2019:** MSU received a \$100,000 operating grant from the Bernard Osher Foundation to enhance the existing Wonderlust program and to work towards transforming the Wonderlust program into an OLLI, with the potential for receiving a \$1M endowment to sustain the OLLI @ MSU

upon completion of goals and metrics. The OLLI @ MSU name is required to receive the endowment from the Osher Foundation.

**February 2020:** MSU submitted an “Intent to Plan” for OLLI @MSU to OCHE with the approval of the President, Executive Vice President for Academic Affairs and Provost, and the MSU Academic Council (approved February 14, 2020).

**March – May 2020:** The BOR Level II proposal for OLLI @MSU was drafted and approved for submission through the required MSU entities including:

Academic Council- March 23, 2020

Faculty Senate – April 22, 2020

**July 12, 2020:** Per BOR policy 1004.1, notification and request for public comment regarding the OLLI @ MSU name change was posted in a press release <https://www.montana.edu/news/20136/msu-proposes-naming-wonderlust-program-osher-lifelong-learning-institute> with a deadline of August 12.

**August 31, 2020:** The MSUAF Commemorative Naming Committee reviewed and approved the proposal for naming the Osher Lifelong Learning Institute at Montana State University.

**September 1, 2020:** Per BOR policy 1004.1 a press release was posted by MSU to announce a public forum:

*BOZEMAN - Montana State University will host two online forums to collect public comment on a proposed name change for MSU Wonderlust, which would become the Osher Lifelong Learning Institute at MSU.*

*The [Montana Board of Regents](#) will consider the name change at its meeting Sept. 16-17, which will be held virtually.*

*The university will host the sessions online via WebEx at 1:30-2 p.m. on Thursday, Sept. 3, and at 4-4:30 p.m. on Friday, Sept. 4. Members of the public can join by visiting <https://montana.webex.com/meet/q97k371> or by calling 1-855-797-9458.*

*Wonderlust was established in 2002 as a lifelong learning program for the over-50 population in the Gallatin Valley, offering non-credit classes, forums and other activities. It is part of MSU Academic Technology and Outreach, which received a \$100,000 grant from The Bernard Osher Foundation in 2019 and would [become one of more than 100 of the foundation’s Institutes for Lifelong Learning.](#)*

*For additional information, contact Bobbi Geise at 406-994-5240 or [bobbi.geise@montana.edu](mailto:bobbi.geise@montana.edu).*

This posting for 2 public forums also appeared on the MUS site at <https://www.mus.edu/PublicMeetings.html>

**September 3 and September 4, 2020:** Open public forums were held via WebEx due to the current COVID 19 environment. There were no participants in the September 3 forum and 2 participants in the forum held on September 4.

**September 16-17, 2020:** The Level II proposal requesting the Osher Institute of Lifelong Learning at MSU will be voted on at the September Montana Board of Regents meeting, BOR ITEM 190-2010-R0920.

**Summary of Public Comment:**

There was very little public comment provided during the written request period and the two public online forums. This lack of comment may stem from the fact that meetings of the Wonderlust Executive Committee, Advisory Committee, Friends of Wonderlust, and numerous volunteer committees, all comprised of campus and community members, have discussed the Osher Foundation Lifelong Learning Institutes potential for many years. These meetings have included discussion of the naming requirement and the pros and cons of changing the Wonderlust name. The Wonderlust newsletter that goes out to over 1400 individuals also explained the name change and requested public comment. As MSU Wonderlust has continued to grow, members believe that the opportunity to be part of a national organization with colleagues in all 50 states, along with financial support from the Osher Foundation, outweighs any concern regarding name change. The program will continue to honor the Wonderlust roots, and to make the name change as seamless as possible for the program members. Both faculty and academic administrators expressed strong support for the program and the naming opportunity in the Academic Council and Faculty Senate meetings.

**We received 3 comments via email:**

*"Many of us Wonderlust members and volunteers have a fondness for the current name of our lifelong learning group - Wonderlust, having had many positive experiences over our years in this organization. I think most of us, though, are now very eager to become the Osher Lifelong Learning Institute at Montana State University. Becoming part of this strong, highly-regarded national network of lifelong learning organizations at universities across the country is really a dream come true for us. We see the new name as gold-standard recognition of our labor-of-love volunteer efforts over the years. We regard this possible name change as an affirmation of the quality and worth of the lifelong learning organization that we helped create and grow."*

*"MSU Wonderlust is a valued program offering innovative intellectual stimulation, social engagement, and leadership opportunities to our "50s and better" population. The vision and achievements of its creators and volunteers delivered the original program into the current partnership with Montana State University, and MSU Wonderlust has now attained acceptance by the Bernard Osher Foundation to become an Osher Life Long Learning Institute (OLLI). The Osher Foundation's support is designed to maintain our program's individuality and build upon the successes of its past almost twenty years' service delivery. With this opportunity, the Montana University System has potentially achieved the prestige of two OLLI designations (at UM and MSU) and I urge the Board of Regents to confirm MSU Wonderlust's status by meeting the Osher Foundation requirement of relabelling the program as the Osher Life Long Learning Institute at Montana State University (OLLI at MSU)."*

*"I prefer the current name."* (note – we have reached out to ask for further elaboration but have not received any additional comment)

**We heard from 2 participants during the public online forums:**

Both participants indicated that they had been part of the Wonderlust program for many years and they felt that we should keep the Wonderlust name because they prefer it to OLLI, it is well known by the members, and it represents the spirit of the program. One indicated that she understood the value of the Osher support and suggested that we might consider finding a way to continue to use both names.