

REPORT OF THE LIFELONG LEARNING COMMITTEE, PASEF

Anita Summers, Chair

May, 2014

BACKGROUND

In the October 2013 PASEF Executive Committee meeting, Anita Summers raised the question of PASEF's potential interest in recommending a lifelong learning program at Penn that would involve retirees as instructors and attendees. It was agreed that she should look into the subject and report back to the Committee. At the November 2013 Executive Committee meeting, after making some calls and online search, she reported some preliminary findings, and was asked to speak with some relevant Penn administrators. At the February 2014 meeting, she was authorized to form a Lifelong Learning Committee to gather additional information and to make a recommendation. Professors Roger Allen, Peter Kuriloff, and Howard Rosenberg constituted the Committee.

The members of the Committee spent many hours collecting the information on Lifelong Learning programs in fifteen universities. They collected information on how they got started, their budgeting, type of attendees, qualifications for teaching, type of courses, number of participants, fee for participants, and type of courses. Details for each of the universities are in the attached table.

The findings and recommendations of the Committee were presented orally at the May 20, 2014 Executive Committee meeting, and were unanimously accepted.

COMMITTEE ACTIVITY

The Lifelong Learning Committee met a number of times. We decided what information we were interested in, created a standard survey form for each of us to use (attached), and decided which of us would contact which universities. We then held several meetings to synthesize the data from the 15 universities, and then developed our recommendations for Penn.

Along the way, we had contact with several university administrators. Anita Summers spoke with Craig Carnaroli (a former student of hers) to get advice on who to speak with about the PASEF interest in lifelong learning. He suggested Nora Lewis, and contact was made with her in January. She expressed great interest, but, after speaking with the relevant administrators, reported that their view was that such a program should not be developed from SAS. It needed a university-wide location. She suggested speaking with the Vice Provost for Faculty, Anita Allen.

Anita Summers spoke with Lubna Mian, Director of Faculty Development, in Dr. Allen's office. She reported that Dr. Allen "thought it was a great idea". Subsequently, on May 9, 2014, Dr. Allen came to a PASEF Executive Committee meeting to discuss several topics involving retirees, and expressed enthusiasm for this project.

In addition, contact was made with Prof. Ed Rock, Vice Provost for Online Learning, to explore possible mutuality of interests. He said there was "a huge potential", and offered to cooperate in any possible way -- obtaining any courses that might be of interest, developing new courses. We discussed a format with which he has been involved -- a session of an online course is presented to attendees (or is seen before), and a retired professor in the field leads the class in discussion.

COMMITTEE FINDINGS

Our synthesis of the survey findings revealed that, though we had initially thought of a university-wide program, the universities we surveyed uniformly saw many benefits from a program that had community breadth -- in addition to intellectual integrity and faculty involvement:

- Retired professors can continue to share their wisdom. The range of subject matter and time of commitment (10 week courses, 5 week courses, Saturday courses, one-time lectures, weekend retreats) allowed combining retirement freedom and teaching obligations. Online learning further facilitated this.

- Repeatedly, those surveyed commented on the tremendous amount of goodwill generated in the community. Older people were drawn to the opportunity to learn about, for example, Law and Justice in Movies, Parents and Children in Shakespeare, Medicine in Literature....

- Alumni loyalty to the university was enhanced. Stanford, Univ. of Chicago, Harvard and others found that senior and non-senior alumni flocked to the courses -- for the courses, and for enjoying a connection to their university. Having courses that are appropriately intellectually challenging, and charging fees appears to screen the attendees for genuine interest.

- Collaboration with online learning enhanced university activity in this area. It was not only used for courses on University facilities; it was also used for courses given at senior living facilities, where there is a built-in audience. (Penn now has a couple of senior living facility courses.)

- There was a net revenue contribution to the University in a number of places. Start-up support by the university was needed in all cases, but, after a several year start-up time, almost all became self-supporting -- and several of the big ones (Stanford, Chicago among them) gave a net revenue to the university.

PASEF RECOMMENDATIONS

Clearly, the development of a university-wide, community-wide continuing education program involves financial and organization plans that are not the task or appropriate responsibility of PASEF. Our recommendations, therefore, are in the form of a list of the broad contours of a plan that we think are appropriate and highly desirable:

- The programs should be available to adults in the Philadelphia Metropolitan Area. Screening of participants should occur by having courses that are sufficiently intellectual in content.

- Courses should be taught by Penn retired professors and other instructors as needed. In most cases, they do not receive compensation, only expenses. There is wide variance in this.

- An annual membership fee was charged by most. Retirees received a discount, and in several cases alumni received discounts. Several contacts made the comment that membership fees (with a card) added to the sense of affiliation with the university by the participants.

- In addition, fees should be charged for each course, depending on its length and location.

Again, consideration should be given for discounts to retirees and alumni.

- Having a wide range of classes was particularly successful -- short courses(3 to 5 weeks), longer courses (10 to 12 weeks), weekend retreats (Friday evening to Sunday early afternoon), one shot lectures, courses preparatory to cruise tours of the university.

- Courses need to be located in places that are accessible to parking, and have easy handicap access.

- Initially, for several years, university financial involvement will be needed. To get started, there will be administrative and marketing costs. In many instances (Chicago, Harvard, Stanford among them), once the program got going, and attracted alumni, there were significant endowments by alumni.

- There is the opportunity to enhance Penn's online learning activities by taking selected courses to the many retirement facilities in the Philadelphia Metropolitan Area.

We see the overarching mission of the University of Pennsylvania in the area of lifelong learning to be one which has an emphasis on the participation of retirees, but is much larger in scope:

TO ENCOURAGE INTELLECTUAL DEVELOPMENT THROUGHOUT ONE'S LIFETIME FOR PEOPLE IN THE PHILADELPHIA METROPOLITAN AREA, BY USING THE SKILLS OF PENN'S RETIRED FACULTY, TO PROVIDE INTELLECTUALLY CHALLENGING COURSES IN A VARIETY OF SUBJECTS, LENGTHS AND FORMATS, INCLUDING ON-LINE LEARNING.

SURVEY RESULTS ON CONTINUING EDUCATION PROGRAMS AT 15 UNIVERSITIES

<u>UNIVERSITY</u>	<u>PENN CONTACT</u>	<u>CONTACT PERSON</u>	<u>CONTACT EMAIL</u>	<u>CONTACT PHONE NO./ WEB PAGE</u>
DARTMOUTH COLLEGE	RA	Thomas Blinkhorn	tblinkhorn@gmail.com	603-646-0154 www.dartmouth.edu/ilead
DUKE UNIV.	RA	Gary Crites	gic3@duke.edu	919-684-2703 learnmore.duke.edu/olli
UNIV. OF WASHINGTON	HMR	Natalie Lecher	nlecher@pce.uw.edu	206-221-7771 www.osher.uw.edu
PENN STATE UNIV.	HMR	Sarah Benton	SJB8@PSU.EDU	814-867-4278 http://olli.centreconnect.org
UNIV. OF DELAWARE	HMR	Linda Osoinach	losoinach@udel.edu	302-831-6870 www.lifelonglearning.udel.edu
HARVARD UNIV.	AAS	Steven Leon	steven_leon@harvard.edu	617-998-8409 www.hilr.harvard.edu
STANFORD UNIV.	AAS	Charles Junkerman	continuingstudies@stanford.edu	650-723-6866 continuingstudies.stanford.edu
WASHINGTON UNIV. OF ST LOUIS	AAS	Robert Wiltenburg	rewilten@artsci.wustl.edu	314-935-6761 lli.wustl.edu
UNIV. OF CHICAGO	AAS	Daniel Shannon	shannon@uchicago.edu	773-213-5650 grahamschool@uchicago.edu
TEMPLE UNIV.	AAS	Adam Brunner	olli@temple.edu	215-204-1505 www.temple.edu/olli
CORNELL UNIV.	RA	Catherine Penner	cusce@cornell.edu	607-255-4987 (or 4800) www.sce.cornell.edu
UNIV. OF CALIFORNIA AT BERKELEY	PK	Patrick Cullinane	pcullinane@berkeley.edu	510-643-3212 http://thecenter.berkeley.edu
PRINCETON UNIV.	PK	Stephanie Brown	pucap@princeton.edu	609-258-0202 www.princeton.edu/community
NEW YORK UNIV.	PK	Carlo Pellicciari	cp74@nyu.edu	212-998-7201 www.scps.nyu.edu
BROWN UNIV.	PK	Ed Mehlman	info@lifelonglearning	401-245-6524 www.lifelonglearningcollaborative.org

SURVEY RESULTS ON CONTINUING EDUCATION PROGRAMS AT 15 UNIVERSITIES

<u>UNIVERSITY</u>	<u>TYPE OF PROGRAM</u>	<u>START</u>	<u>HOW IT STARTED</u>
DARTMOUTH COLLEGE	for whole community	1990	group of 38 locals approached the college
DUKE UNIV.	part of Continuing Studies and Center for Aging	1977	collaboration of these two centers
UNIV. OF WASHINGTON	part of Educational Outreach Dept.	2006	heard about Osher
PENN STATE UNIV.	affiliated with Continuing Education, but is a separate part	1997	Univ. initiated it by providing office space, internet, needs assessment and marketing
UNIV. OF DELAWARE	unit within Continuing Education	1979, 1989, 2010	started small in one site, then expanded to three sites
HARVARD UNIV.	branch of Continuing Education, but separate program	1977	initially led by retirees, with strong support of Pres. Derek Bok
STANFORD UNIV.	part of Continuing Education	1994	started to service those who wanted liberal arts education, but not regular courses
WASHINGTON UNIV. OF ST LOUIS	part of Continuing Education	about 1994	influential alums knew of Harvard program, and Elderhostel
UNIV. OF CHICAGO	part of Continuing Liberal and Professional Studies	1945	started from extension of the Great Book Courses
TEMPLE UNIV.	housed under Continuing Education, but entirely separate part for seniors	1976	someone connected to Temple had attended the New School Program
CORNELL UNIV.	External Visitors Program for adults who are not Cornell degree candidates	1968	derived from their summer session programs, which began in 1876
UNIV. OF CALIFORNIA AT BERKELEY	Learning in Retirement program	2000	organized by emeriti professors
PRINCETON UNIV.	Auditing can do Continuing Education, expensive, requires 2 yrs. College admission	n.a.	n.a.
NEW YORK UNIV.	Continuing Education -- no separate part for retirees - left Osher because of that	1935	in response to the Depression: for social workers and adult work-seekers -- then expanded in 1945 for veterans
BROWN UNIV.	originally housed at Brown, now state-wide Lifelong Learning Collaborative	2009	Univ. was not supportive, charges were high, caused spinoff

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<u>UNIVERSITY</u>	<u>MEMBERSHIP ELIGIBILITY</u>	<u>MEMBERSHIP SCREENING</u>	<u>NO. OF STUDENTS</u>	<u>WHO TEACHES</u>
DARTMOUTH COLLEGE	anyone living in the area	no	1700 +	faculty and other study leaders
DUKE UNIV.	anyone over 50 years	no	1800	peers, outside experts, retired faculty
UNIV. OF WASHINGTON	anyone over 50 years	no	900 +	regular, retired and affiliated faculty
PENN STATE UNIV.	anyone over 50 years, promoted to retirees	no	1200	faculty, retired faculty, local school teachers and experts
UNIV. OF DELAWARE	anyone	no	500, 130, 2150	volunteers who know subject
HARVARD UNIV.	anyone over 55 may apply who is retired, and screened	yes, interview, 50-70% accepted	550	peers, mostly retired faculty, and some outside experts
STANFORD UNIV.	anyone in the Bay area (median age = 46)	no	11000	faculty, retired or not, artists, business professionals
WASHINGTON UNIV. OF ST LOUIS	anyone over 55, most in 70s and 80s	no	650, 670	mostly not faculty, local experts, "knowledgeable peers"
UNIV. OF CHICAGO	open to anyone, but curriculum is "daunting"	no	600-700	mostly retired faculty and PhD students
TEMPLE UNIV.	open to anyone over 50	no	1200	retired faculty, school teachers
CORNELL UNIV.	adults, not going for a degree	no	n.a.	regular faculty
UNIV. OF CALIFORNIA AT BERKELEY	open to retired staff, faculty, partners	no	over 1000	retired faculty, volunteer faculty, outsiders
PRINCETON UNIV.	anyone in the Princeton community over 18	no	2400	Princeton faculty
NEW YORK UNIV.	anyone	no	27-30,000	non-tenured adjunct faculty and industry professionals
BROWN UNIV.	"intellectually curious adults"	no	450	each person takes a topic in the syllabus and teaches a session

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<u>UNIVERSITY</u>	<u>TEACHER SCREENING</u>	<u>FEES FOR PARTICIPATION</u>	<u>BUDGET</u>
DARTMOUTH COLLEGE	leaders screened and evaluated	\$60 annual membership fee; \$35 short courses; \$55 long courses	\$350,000
DUKE UNIV.	qualifications are assessed	\$35 membership fee; 11 weeks course is \$90; Courses priced individually	\$440,000
UNIV. OF WASHINGTON	interviewed by staff	\$35 membership fee; \$30-45 per class	\$200,000
PENN STATE UNIV.	assessed by Curriculum Committee	\$50 per year for membership: \$10 per session	Inc. = \$231,000 Exp. = \$119,000
UNIV. OF DELAWARE	syllabus submitted to Committee	different fees, for each site: \$130, \$140, \$240	\$200,000
HARVARD UNIV.	interview and Curriculum Committee	\$800 annual membership for 1 to 3 courses per semester	over \$400,000
STANFORD UNIV.	yes, not formally	\$400 a quarter + \$35 registration fee; 20% discount for faculty and 65+	revenue covers costs: surplus goes to univ.
WASHINGTON UNIV. OF ST LOUIS	yes: Director meets or someone knows	6 courses (2 each semester) is \$420 9 courses (3 each semester) is \$635	\$250,000
UNIV. OF CHICAGO	by reputation	7 week courses = \$275; 1 lecture = \$70; Weekend retreat = \$275	"at worse, breaks even, surplus goes to Univ."
TEMPLE UNIV.	syllabus plan, interviewed by 3 people	full year (3 sessions) = \$295; 2 sessions = \$190; 1 session = \$90	\$280,000
CORNELL UNIV.	regular courses	\$121 per course if instructor permits	none needed
UNIV. OF CALIFORNIA AT BERKELEY	committee of retired profs vet courses	nominal	n.a.
PRINCETON UNIV.	like regular courses	noncredit courses = \$150; credit courses = \$872 for current employees, \$2614 for retired profs, staff, spouses	n.a.
NEW YORK UNIV.	by reputation	\$4-5000 for 1 course (2 1/2 hrs, 8x) \$4200 for courses involving high tech	"confidential"
BROWN UNIV.	committee vets the "teachers"	\$25 membership; \$50 per course	n.a.

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<u>UNIVERSITY</u>	<u>UNIVERSITY SUPPORT</u>
DARTMOUTH COLLEGE	pay modest rent in a campus building
DUKE UNIV.	get classrooms, but pay % of revenue to the University
UNIV. OF WASHINGTON	program pays for classrooms and the use of the University of Washington name
PENN STATE UNIV.	University provides use of 3 classrooms and reduced parking fees
UNIV. OF DELAWARE	Osher and Univ. gave initial seed money; do not use Univ classrooms
HARVARD UNIV.	Univ. provides continuing education classrooms and building. Development office raised \$1 million endowment
STANFORD UNIV.	none
WASHINGTON UNIV. OF ST LOUIS	gives Clubhouse with associated parking
UNIV. OF CHICAGO	started with subsidy; Univ. charges rent
TEMPLE UNIV.	Univ. gives classrooms, equipment, office, program pays 13% of membership dues
CORNELL UNIV.	none needed -- regular courses
UNIV. OF CALIFORNIA AT BERKELEY	Univ. provides discounted parking, budgeted by State Leg., % of retirees email charge
PRINCETON UNIV.	tuition charges cover costs
NEW YORK UNIV.	none needed -- regular courses
BROWN UNIV.	none

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<u>UNIVERSITY</u>	<u>TYPE OF COURSES TAUGHT</u>
DARTMOUTH COLLEGE	Understanding the Middle East -- Joy of Mathematics -- Law and Justice in the Movies
DUKE UNIV.	Art and Architecture -- Performing Arts -- Religion and Philosophy -- Computers -- Lifestyles and Wellness
UNIV. OF WASHINGTON	3000 Years of Chinese Politics -- Documents that Changed the World -- Opera of the Romantic Era -- Biomedical Devices in Advancing Personalized Medicine
PENN STATE UNIV.	Cezanne in Provence -- From Easel to Frame -- Social Ballroom Dancing -- Mah Jongh -- Coin Collecting as a Hobby -- Reverse Aging -- Six Easy Steps to an Effective Estate Plan
UNIV. OF DELAWARE	Artists Lives and Techniques -- Painting Workshop -- Concern Ban -- Ancient Middle East-- Atheism, Morality, and Spirituality -- American's Poet Laureates
HARVARD UNIV.	Parents and Children Shakespeare -- Quantum Physics for Poets -- Spy Fiction -- Medicin in Literature -- Governing the World -- Beethoven's String Quartets
STANFORD UNIV.	The Psychology of Guilt -- Georgia O'Keefe --Modernism. Mission statement: liberal arts for adults in the community
WASHINGTON UNIV. OF ST LOUIS	Reading the Wall St. Journal -- Digging in Jerusalem -- Writing Fiction -- Prayers and Poetry -- Italian Renaissance Art
UNIV. OF CHICAGO	7 week courses: History of American and European Architecture-- Weekend study retreat: Robert Frost's Poetry -- Single Lecture: Love and Work -- Free Lecture: Shakespeare on the Respect Due to Rulers
TEMPLE UNIV.	The Tragic and Unusual of Great Opera Singers -- Experiencing Art -- Practical Calculus -- Introduction to Tai Chi -- Sing for Joyu, for Health, for Memory -- Critque Writing Workshop
CORNELL UNIV.	Any course in the regular curriculum, except participatory ones: e.g. photography, languages, studio art, computer science, lab sciences
UNIV. OF CALIFORNIA AT BERKELEY	The Biology of Violence -- Global Warming -- The Bay Bridge Budget -- Islam in the Mediterranean: Empires, Religion, Communities, Identities -- Religious Uniformity and Diversity in the Ancient and Medieval Mediterranean
PRINCETON UNIV.	Gender and Sexuality in Modern American -- History of Evolution -- Integrated Quantitative Introduction to the Natural Sciences -- Topics in Italian Cinema: the New Italian Cinema -- Mechanical Design
NEW YORK UNIV.	very oriented to specific jobs: The Design Entrepreneur -- Social Media Marketing -- Fundamentals of Campaign Management -- also: World Politics: The Struggle for Leadership -- The Rise and Fall of the Left in Latin America
BROWN UNIV.	All that's Jazz: Ragtime, Blues..... -- Current Decisions -- LLC Scrabble/Games -- Plain Air Art Group