

**Encore Center for Lifelong Enrichment
McKimmon Center for Extension & Continuing Education
Annual Report, 2008-09**

Review of Programs

Scope, Volume, and Achievements

1. Total Encore membership numbered 1,056, compared to 1,048 last year. Twenty-six percent of members were new to Encore, 62% were members the previous year, and 12% returned to Encore after a break of a year or more.

2. Eighty-one short courses were taught, with a total enrollment of 3,017, a slight increase of one percent over last year's 2,980 and the largest enrollment ever. Fifty-two of the short courses were newly developed for the 2008-09 program year (64%). Thirty-five special events, study trips, and colloquia were offered, with a total enrollment of 2,689 (a six percent increase over last year's 2,535). Seven courses were taught off-site in collaboration with campus and community partners, and four courses had a field trip component. Four courses were team taught by two or more instructors, and 18 courses featured multiple guest speakers.

Fifty-seven NC State current and emeriti faculty, staff, and students from 29 different campus units taught courses or portions of courses, colloquia, or events. Nineteen Encore members, 16 current and emeriti faculty from other colleges and universities, and 74 individuals from the community taught or coordinated courses or colloquia.

The Program Committee played an active role in developing new courses and finding ways to enhance the program. Guidelines for new Encore instructors were developed, and a class host evaluation was created so these valuable liaisons could play a greater role in giving classroom feedback. Innovative formats accommodated different programmatic or instructor needs. A special three-session course on *Eat Local, Eat Healthy* introduced participants to local and organic food producers and markets. The course was offered at restaurant and supplier sites, and each session featured presentations by food producers and suppliers followed by lunch at restaurants that use locally-produced food. A three-week mini-course on *An Economic Outlook at Our Nation and State* was taught by Michael Walden, NC State William Neal Reynolds Distinguished Professor.

Several courses each semester kept Encore members current with trends and enhanced their engagement as citizens. Among these were courses and lectures on the 2008 election; digital photography; immigration trends; nano-technology; data mining; global environmental issues; changes in NC agriculture; new technology; and the culture, politics, and history of a variety of different countries. A course taught in conjunction with the National Veterans History Archival Institute gave Encore members the opportunity to hear from World War II veterans who saw action in the war. All of these veterans had documented their oral histories for the Library of Congress' Veterans History Project.

3. The average number of courses taken per member per semester was 1.8 in the fall and 2.0 in the spring. Seventy-one members chose membership-only, and did not enroll in any courses; 17

members enrolled in the gym program but did not take any classes. Encore members ranged in age from 50 to 90+.

4. Eighteen events and study trips were offered. Three specially-arranged tours, not available to the general public, were developed: *Moving Midway* gave Encore members the opportunity to view the documentary, visit the Midway plantation house, and hear about its history from family members; *Officina Briani* allowed members to learn about a small letterpress operation; and *Zen and Zinnias* gave members the chance to visit a Buddhist temple. Both because of a staff transition and the state of the economy, an additional domestic study trip was offered in lieu of an international study trip. Four multi-day study trips took members to Atlanta, Santa Fe, New England, and West Virginia. The trip to New England was preceded by a six-week course taught by Dr. Jim Clark on *New England Writers Revisited*.

5. Encore's Fall Open House and Kick Off Colloquium featured *News & Observer* columnist Barry Saunders, and attracted 340 members and guests (the largest kick-off to date). The Spring Kick-Off Colloquium featured *News & Observer* columnist Rob Christensen, who spoke about Tarheel politics, and 170 attended.

6. At the September Advisory Council meeting, a discussion about Encore's growth trends resulted in the decision to form an ad hoc committee on growth to examine this issue in a more deliberate way. This committee, comprised of representatives from all the standing committees, met throughout the program year and reported back to the Advisory Council at its April meeting. Among the issues studied were classroom space, instructor recruitment and retention, volunteer development, communications, special activities, and finances. There was consensus that the issue of communication should receive further attention in the near term. Now that Encore attracts over 1,000 members annually, there is a need to innovate better and different ways to communicate with members and maintain a sense of community. Expanding ways of communicating electronically will receive some attention since 80% of Encore members give email addresses when registering. Email has proven to be an effective way to communicate with members regarding both administrative matters and course content.

7. Members who were identified as being experienced and outstanding class hosts were offered an incentive for hosting Encore's off-site and evening courses. In exchange for hosting an evening or offsite course, these excellent class hosts were given free enrollment in the course and a coupon for a future course. These incentives recognize that hosting one of these courses requires greater effort to coordinate among the Encore staff, the venue, and the instructor. Staff identified the individuals eligible for this incentive and invitation letters were sent prior to each registration period.

8. Encore members volunteered for four campus projects. Seven Encore members helped the Office of International Services with new international student orientation in August by providing short-term housing, picking students up at the airport, and assisting with orientation events (2nd year). Twenty-five members volunteered with the Stop Hunger Now food distribution project organized by the Center for Student Leadership, Ethics, and Public Service (2nd year). Nine Encore members volunteered with the Emerging Issues Forum, helping with check-in and other logistics (8th year). And for the sixth year in a row, 23 members helped the

NC State Forestry Department stuff seedling packets for the department's annual Arbor Day giveaway.

Additionally, in July, NCSU Industrial Design graduate students recruited Encore members for studies that focused on universal design issues such as clamshell packaging, medical dose packaging, and grocery store hand basket design. Twenty members participated in this initial round of studies. The response was so good that one of the students followed up in March for additional help, and twelve Encore members volunteered to help with a study on Handgrip and Texture. The graduate student who served as liaison for recruitment of Encore members noted that "Encore members have really been a great help and we appreciate it so much."

In September, Encore members and staff assisted a Malaysian graduate student pursuing a master's degree in Adult and Community College Education. Her research focused on adult education programs "in practice," and she chose Encore to study. She interviewed Encore's director, eight Encore members, and one Encore instructor, and she also observed the course *Election 2008*. The student gained concrete information about how Encore members benefit from the program, and she stayed engaged with the program throughout the year, attending both the Seasonal Celebration and Instructor Recognition Luncheon.

In March, Encore assisted the NC State Solar Center and Waste Reduction Partners in their efforts to recruit retired engineers to conduct energy and environmental audits. A half dozen Encore members responded, which Waste Reduction viewed as a good response. They had asked Encore to help as they geared up to respond to projects funded by the federal Recovery and Reinvestment Act.

9. In January, 42 new Encore members attended the sixth annual Newcomers Orientation. The program is designed to acclimate new members to Encore and encourage their full participation in a program that relies heavily on volunteer member talent. Thirty-four of the attendees returned evaluation forms; 28 rated the effectiveness of the format as excellent, and six as good. Twenty-seven rated the information presented as excellent and seven as good. Several Encore members, staff, and members of the Membership Development and Marketing Committee helped organize and run the orientation.

10. Encore's extracurricular groups continue to provide an outlet for members' special interests:

- A new group, the Encore Trailblazers, was formed in the fall. This group organizes weekly hikes on area walking trails and attracts 10-25 members each week. The Trailblazers promote exercise and provide another opportunity for members to socialize. Weather permitting, the group also picnics after the hike.
- The Encore Writers Group meets monthly, with about ten members on average participating each month. Two Encore members keep the group on track.
- The Encore Book Group meets monthly at Quail Ridge Books for discussions of fiction and nonfiction. The group provides two meeting times each month to accommodate demand, for a typical monthly total of about 25 participants.
- The Encore Knitting Circle attracts an average of eight members for the informal weekly get-togethers at Bruegger's in the Ridgewood Shopping Center.

- The Encore movie group provides monthly opportunities for members to get together and share a meal and go to the movies (usually of the art-house variety).

11. Program promotion included the regular submission of press releases to the general media, the 50+ focused media, and the university news services. Various articles and news items about Encore were featured in the November, December, April, and May issues of the Elderhostel Institute Network's monthly newsletter; the *NC State* alumni magazine; the *News & Observer*; *MyNC.com* (affiliated with NBC channel 17); *Boom!* magazine; and the *NC State Bulletin* newsletter. Staff and committee members also made contact with select human resource personnel and real estate and bank relocation staff to encourage them to share information about Encore.

Staff, members of the Membership Development & Marketing Committee (M&M), and other Encore members made presentations to five senior, community, or retiree groups and participated in two senior or community information fairs. Another important means of disseminating information about Encore is the catalog distribution by M&M committee members to over 50 sites such as libraries, health clubs and senior centers. Committee members also made follow up contact with 20 companies, organizations, and clubs to determine what type of information they would like about Encore for their members (presentation, catalog distribution, etc.). A review of the end-of-course surveys and the Encore membership database indicate that these various efforts pay off: in addition to word-of-mouth marketing, new members cited a variety of sources regarding how they first heard about Encore.

In September and October, M&M Committee members called 109 inactive members. The committee does this annually both as an additional means of assessing the program, as well as a way to encourage inactive members to return. Fifteen numbers were out of service and committee members were unable to reach 38 called. Of the 56 inactive members reached, 39 spoke positively about Encore but were unable to participate currently for a variety of reasons. Three did not comment on how they felt, but asked to remain on the mailing list. Three were brusque or noncommittal with the caller. Two told the caller that cost was an issue. Two did not recall getting the fall catalog and asked that one be sent. Two were working now and had trouble finding the time for Encore. One had moved and asked that the catalog be sent to the new address. One preferred the types of classes that Wake Tech offered. One said he would sign up (and did). One expressed dissatisfaction, stating that Encore did not measure up to Harvard's program, where she had participated previously. One stated that by the time he called to sign up, there was a waitlist for the class he wanted. Once again this year, the callers had the impression that former members have been generally pleased with Encore, and that these phone calls generate good will. By the end of the program year, 15 of those contacted had joined Encore.

12. Betty Singletary, chairman of the Activities and Services Committee was the fourteenth recipient of the Betty Poulton Volunteerism Award, given in recognition of outstanding volunteer service. Betty has also served as a class host and as Encore's volunteer coordinator.

Collaborative Efforts

Encore seeks collaborations with campus groups because they strengthen the bond between members and the university and directly benefit programming. In addition to the contacts noted

elsewhere in this report, and the obvious strong support from the variety of campus units that provide instructors, the following are additional examples of how Encore worked with campus and community groups in 2008-09:

- For the sixth year, the Office of International Services (OIS) helped Encore organize a class, *Postcards from Around the World*, in which international students gave overviews of their countries' history and culture. In the spring, Encore members and OIS developed a new class, *Arts: A Multicultural Perspective*, in which international students had the chance to showcase the arts and music from their countries. OIS also assisted with Encore's Seasonal Celebration by arranging for international students from India to provide musical entertainment. On Memorial Day, Encore members hosted a cookout at Pullen Park, which 30 members and 50 international students attended. Given Encore members' life experiences and interest in the wider world, these collaborations with OIS have been a natural fit.
- For the third year, NC Museum of Natural Sciences staff have provided courses for Encore. These courses are offered on-site at the museum to take advantage of special exhibitions and other museum resources. Members of the Encore program committee work with museum staff to choose the topics. This year two classes, *North Carolina Wildlife and the Environment* and *For the Birds* were offered.
- Encore continued to offer one year of complimentary membership to NC State faculty and staff retirees. Five retirees took advantage of this offer this year, and two retirees from previous years returned in 2008-09. Encore partners with Human Resources in identifying who is eligible for this benefit. Human Resources also invited Encore staff to present information about Encore at two pre-retiree planning workshops.
- Encore members provided feedback about aging issues to the NC Center for Public Policy Research. As part of a colloquium on public policy issues affecting the aging in North Carolina, Mr. Ran Coble, director of the Center, enlisted Encore members to provide him with their views on the pressing issues facing older adults. The Center will use this feedback to help develop priorities for a forthcoming report on aging issues.
- The Encore affiliate, the B-Western Film Preservation Society, continues to offer monthly cowboy movies and serials to Encore members and other interested adults.

Encore staff helped Center Stage, the Retired Senior Volunteer Program, and Big Sweep North Carolina publicize their need for volunteers. Again this year Encore provided an Encore membership gift certificate for the Woman's Club of Raleigh's silent auction, a fundraiser benefitting Hospice of Wake County and other community organizations. Nine Encore members made financial contributions so that a composition by J. Mark Scearce, NC State's director of Music, could be produced for use by the Duke Raleigh Hospital Guild in their Health, Arts, and Healing Initiative.

Special Program Reviews

Member Impacts

Inherent in Encore's mission is the goal that participation in Encore will positively impact members' quality of life. The following quotes are a sample of the comments Encore members made in the past year about how the program has affected their lives:

- "Since I retired, I find that 'staying in touch' has become a primary concern. Encore is a primary factor in doing that."

- “This is an election year. I have tried to take courses over the past year that would enable me to better understand the issues. In this context, Encore has been extremely important and helpful to me.”
- “Encore continues to help keep me in touch with world developments as well as contributing to my staying mentally alert. It also provides an activity that I can do with my husband which stimulates discussions outside of class.”
- “I like to brag to my friends far and wide about how NC State has the fantastic Encore program with so many interesting subjects taught by talented and varied instructors.”
- “The courses are so delightful and stimulating and on such a variety of topics that I wouldn’t ordinarily be able to explore on my own. I especially enjoy the insights and expertise of my classmates. I try new topics to expose myself to a wider variety of ideas and people unlike myself. Surely this is a prescription for mental growth and staying engaged and interested in life.”
- “My life is better than ever before. Over my retirement years, Encore has become – next to my family – the focus of my time. The benefits have been real, mental and physical.”
- “The classes I have taken have made me rethink some opinions and conclusions that I have had. I look forward to more intellectual stimulation and meeting new people.”
- “Encore has become the center of my life since my retirement five years ago. The courses and instructors keep my mind stimulated, and the hundreds of new friends (my fellow students) have enriched my life immeasurably.”
- “Encore is good for my activity level and physical health – it gets me out of the house and thinking about different topics.”
- “We have met wonderful, interesting people and gone to places we never would have gone to on our own.”
- “Encore keeps me informed about a changing world. It is great to have this kind of intellectual stimulation available. Keep up the good work.”
- “Encore helps me rebuild stamina from long-term health problems. It currently gives me a sanity break from my husband being in the hospital and other family crises. It gets me more completely informed about today’s news – finance, economics, politics, science, technology, international news, healthcare ... and more. Encore helps make it come alive.”
- “The very existence of Encore enriches the community at large and the university in particular!”
- “I continue to be impressed with the feeling of well-being I experience when taking these classes. One does not focus on aches and pains when you have an interesting class to think about.”
- “Encore has had an impact on my quality of life because I’m more intellectually stimulated, I have something interesting to tell others at social functions, I’m meeting lots of new and interesting people, and it increases my personal body of knowledge.”

A former Encore member who moved to Houston four years ago sent the Encore staff an email that included this comment: "Actually, the reason that I am writing is just to let you know that we miss the entire Encore program so much. There is nothing here that resembles the program in any way. I am starving for such a program and think that most of your participants don't realize just what a wonderful program they have, as I didn't when I was there."

End-of-course evaluations rated 81% of Encore instructors as excellent and 19% as very good (overall rating on a five-point scale was 4.7). Seventy-seven percent of the evaluations rated Encore courses as excellent, 22% as very good, and 1% as good (overall rating on a five-point scale was 4.7) On average, 53% of course registrants completed course evaluations. Headcounts taken in final class sessions showed that approximately 80% of registrants were still attending.

Evaluations of the multiple-day study trips also registered a high degree of satisfaction. On a five-point scale, participants rated the Atlanta trip as a 4.6, the trip to Santa Fe as a 4.9, the trip to New England as 4.8, and the trip to West Virginia a 4.6. All these evaluation data met established quality benchmarks.

Instructor Impacts

Forty-eight instructors completed evaluations of their experience, and 46 of them said they would consider teaching again. Among the comments made by instructors during the year were these:

- “Encore members are self-motivated, eager, and a joy to teach.”
- “Once again I had a wonderful time teaching and sincerely believe that Encore is a wonderful program!”
- From a first-time instructor: “It was fun. Thanks for the opportunity.”
- Comment from Encore instructor and member: “Thanks for all you do – Encore plays a very important part in my life – both teaching and taking courses.”
- From an Encore instructor and former college president: “In my 40 years of college teaching, these 10 years with Encore compete for first place (well, almost!).”
- “I truly enjoyed my class and the interactions with them. It was a beautiful learning experience for me as well.”
- “Thanks for giving me the privilege of sharing in the excitement of Encore.”
- “Teaching at Encore is not really teaching. It’s a discussion with wise and wonderful students.”
- “Teaching in Encore is one of the highlights in my life.”
- From a retiring NC State professor, who taught for Encore and was moving out of state: “My experiences in Encore have been highlights of the 20 years that I have spent at NC State, with the *Great Decisions* being the best. Thanks for all your encouragement and work. I hope that Encore continues to grow and flourish... Best to you as you ... deliver probably the best REAL educational experience and impact anywhere in North Carolina.”

Economic Impacts

1. In 2006, NC State’s vice chancellor for extension, engagement and economic development, James Zuiches, established a university-wide task force to find a way to better measure the economic impact of the university’s many extension and engagement activities. This task force on Benchmarking Economic Development Impacts (BEDI) completed its initial work by 2008, and recommended the use of Logic Models to capture these impacts. In January 2009, Encore’s director agreed to work with a BEDI consultant in developing a logic model for Encore as BEDI II implemented its pilot phase. The resulting Encore logic model demonstrates the connection between Encore programs and positive economic impacts for the community (see Appendix).

2. Encore's special programs coordinator, Joan Hardman-Cobb, conducted a survey in February to gather member feedback as she plans for future study trips. Eighty-three members responded to the survey, which is a good response rate given that the majority of Encore members enroll in the short courses only. The survey included a few questions on the impact Encore programs have made on members' travel and arts purchases. Thirty-nine of the 83 stated that they have returned to an arts venue after first going there with Encore; 24 said they've made a season ticket purchase; 25 said they've made a purchase from a store or other business after first becoming aware through Encore. Several also noted that they have encouraged others to go to a performance venue, visit a site, or take a trip after participating with an Encore group.

Outreach and Diversity

Encore is committed to building a diverse membership, and, in keeping with NC State's land grant mission, serves as a resource to the community as well. The following summarize the results of these efforts:

- Minorities comprised approximately three percent of Encore's 1,056 members.
- Encore continued its partnership with Glenaire retirement community to use their multipurpose room for courses. This provides additional space for Encore to hold classes for its members, but it also allows Glenaire residents who are hesitant to travel to the McKimmon Center to access Encore programming, thus providing additional outreach to the community. Three courses – *Scottish Traditions and Their Origins*; *Silk Flags, Ironclads, and Bushwackers*; and *The Great War at Sea* – were offered and drew enrollment from both Glenaire residents and Encore members. One Glenaire resident wrote this comment in her course evaluation for the *Silk Flags* course: “Since retirement, Encore has offered exciting opportunities to continue to learn. And since I gave up driving, having courses offered at Glenaire is wonderful - thank you!”
- In keeping with the philosophy that diversity enhances the educational experience for all, seven courses, five lectures, and four special events and study trips dealt with diversity themes. The trip to Santa Fe and the *Moving Midway* event were notable examples. This comment from the Santa Fe trip evaluations was a typical reaction to the experience: “I enjoyed learning about the interaction of cultures; i.e., Indian-Spanish-Anglo melding of religions and the similarity of Indian and Eastern beliefs – this has become a new interest for me.” The *Moving Midway* event included a viewing of the documentary, which made many film critics' Top 10 lists for 2008, followed by a specially-arranged tour of the Midway plantation home. The documentary tells the story of moving an antebellum house to a new location and how connections were made during the filming between the filmmaker's family (the owners of the house) and some of the descendants of Midway's slaves.
- Encore's annual Seasonal Celebration, held in December to mark the end of the fall semester, showcases the talents of Encore members, instructors, and friends. Among the highlights: The Voices Together Singers, a group of adults with developmental disabilities, received a standing ovation after performing their medley of seasonal songs. Two international students from India sang and played the guitar (this was arranged through the Office of International Services). Encore members also played instruments, sang seasonal songs, and performed readings.

- Members with accessibility, distance and financial concerns comprised two percent of Encore's membership.
- Staff made accommodations for Encore members with vision and mobility issues, and other Encore members volunteered to provide transportation and other assistance for Encore members. Encore and McKimmon staff worked together to ensure members with handicap-parking permits were able to park in accessible spaces, even on busy days.
- Three Encore members received financial aid to take seven courses. Twenty-five Encore members contributed \$959 to the Encore course bank to offset the cost of this financial aid.
- Two courses that had been previously recorded were broadcast on Cooperating Raleigh Colleges (CRC) educational television channel: *Retirement vs. Financial Independence – Moving Beyond the Numbers* and *Energy – Where are We Going?*
- One course – *Gadgets and Other Neat Stuff* – was recorded for later broadcast and rental by members.
- Encore's director served as a consultant for other existing or prospective lifelong learning institutes at East Carolina University, UNC-Asheville, University of South Dakota, Northern Virginia Community College, and California State-San Bernardino. Staff also provided program advice and information to other organizations/individuals that serve adult learners, such as Abbotswood retirement community, Glenaire, and the Whitaker Mill Senior Center.

Financial Report

Encore was impacted by the gloomy economic climate, anticipated budget cuts, and staff transitions. Despite careful management of revenues and expenses, it was necessary to draw \$5,985 from reserves to balance Encore's main operating account at the close of the fiscal year. Anticipated cuts in McKimmon funding support (announced in FY 06-07) were implemented in FY 08-09. All Encore staff were impacted by the May/June half of one percent salary cut and flexible furloughs announced by Governor Perdue in late April. Total operating account revenue (excluding study trip and event income) was \$169,557 compared to \$166,160 in FY 07-08 and 149,295 in FY 06-07.

Efforts were continued to raise funds for the Korte/Kirsch Encore Endowment, despite the economic decline. A fall appeal letter was sent to 155 members identified as previous donors or committee members, which resulted in 31 gifts totaling \$3,972. A total of \$13,788 in contributions was added to the endowment in this fiscal year; this included the completion of pledges from the fundraising campaign two years ago as well as new contributions. Endowment income funded the gifts and lunches for instructors at the annual spring Recognition Luncheon, reimbursement to instructors for select classroom supplies, and gasoline expenses for instructors traveling from communities outside the Triangle region. Anticipating that the stock market decline would impact short-term endowment earnings and thus the next year's spending budget, expenditures were limited to leave a balance in the FY 08-09 spending budget for use in FY 09-10.

Encore and McKimmon staff sought sponsorships for the Encore catalog, resulting in four organizations sponsoring Encore at the platinum level of \$1,000 (Cypress of Raleigh, Glenaire, Springmoor, Kerr Drug). These sponsorships raised \$4,000, which partially offset the rising

costs of catalog production. An ad exchange (at the bronze level) was made with the Raleigh Chamber Music Guild.

Encore staff also explored ways to streamline Encore's registration system to meet the needs of a growing program. In recent years, a temporary worker was brought in during busy times, but this has proven to be a less than ideal solution because of the training involved and varying ability levels. Over the course of the year, discussions were held with both McKimmon's Accounting office and the Office of Professional Development (OPD) staff to discuss how Encore could improve current systems and outsource some tasks to these other McKimmon units in a cost effective manner. In March, some of the intake aspects of registration were outsourced to Accounting, and other registration tasks will be shared with OPD staff beginning July 2009. Although there are costs associated with outsourcing, it is a more cost-effective solution than adding staff.

The Advisory Council approved two changes designed to stabilize finances and deal with growth issues. In March, the council approved the elimination of the discount for members taking four or more courses in a semester, which will bring in additional income to offset some registration outsourcing costs and as well as help streamline registration processing. In April, the council approved a \$5 charge for some of the Monday afternoon lectures. Two lectures each semester will remain as "colloquia" and be included with membership, but the others will be named "Monday Matters" and cost \$5 each. This will help pay for the rental of a larger room (necessary as Encore has grown larger) and help encourage members to attend if they enroll. Both of these changes will be implemented in FY 09-10.

Staff

- Two new staff members joined Encore in 2008-09. Joan Hardman-Cobb joined Encore in August as special programs coordinator, replacing longtime coordinator Betty Poulton, who retired in June 2008. Given that study trips and special events have become an integral part of Encore programming, this position was made permanent with benefits, and Joan was hired as a 10-month, 30-hour employee.
- Program Coordinator Lee-ann Courtney resigned December 2008, and Nancy Huber was hired as the new program coordinator.
- Encore's director, Tricia Inlow-Hatcher, chaired the Mary Frances Hester Service Award Committee and served on the McKimmon Turner Award Committee. Lee-ann Courtney served on the committee that organized McKimmon's In-Service Day.
- In October, Inlow-Hatcher was a symposium presenter at the 2008 North Carolina Conference on Aging held in Greenville, NC. The subject of the symposium was "How Lifelong Learning Programs Promote Thriving through Learning, Service, and Leadership in Life's Second Half." Co-presenters were the director of Duke's Osher Lifelong Learning Institute and a member of UNC-Asheville's Center for Creative Retirement. Inlow-Hatcher's presentation focused on how Encore contributes to making Wake County a "senior-friendly community" (a conference theme) and the impact Encore makes on members and the community.

Recommendations and Concerns for the Future

We are concerned about future budget cuts, as well as accommodating growth and having the financial resources to effectively address that growth. Discussions via the ad hoc committee on growth have identified several ways that we might address some of these growth issues, particularly relating to communication and community. Increases in room rental rates, administrative charges, printing costs, credit card fees, and cuts in McKimmon support will pose financial challenges into the future. Staff, in conjunction with the member-staffed Encore committees, will continue to actively seek new ways to provide the necessary program funding. FY 09-10 will present special challenges as the state of North Carolina continues to react to the economic downturn. Nevertheless, we are committed to finding innovative solutions to growth and budget challenges that will allow us to continue to provide the excellent programming that members have come to expect.

Appendix A
Logic Model for Encore Center for Lifelong Enrichment

INPUTS	ACTIVITIES	OUTPUTS	SHORT TERM OUTCOMES	MEDIUM TERM OUTCOMES	IMPACTS
<p>Staff</p> <p>Community & NC State Partners</p> <p>Encore members</p> <p>Encore committees</p> <p>McKimmon Center funding</p> <p>Program fees, endowment and other resources</p>	<p>80+ courses on a wide variety of topics offered annually and assessed through the end-of-course evaluations</p> <p>30+ special events, study trips and lectures offered annually; multi-day study trips assessed through evaluations</p> <p>Comprehensive member survey conducted in 2007</p> <p>Short-term Volunteer Activities</p> <p>Five extracurricular, member-led groups allow members to pursue special interests (hiking, book group, etc.)</p> <p>1000+ adults aged 50+ participate annually</p> <p>Training and development of class hosts and committee members</p> <p>Program marketed to the community and members are encouraged to become more actively involved in the program</p>	<p>Impact statements and surveys from members and instructors collected</p> <p>Member involvement with program development and implementation nurtured and sustained.</p>	<p>Adults aged 50+ make social and community connections, and the transition to retirement is eased.</p>	<p>Encore members are motivated to stay healthy, engaged, and independent, and are therefore less likely to deplete the community's healthcare and other resources.</p>	<p><u>Human Capital Enhancement</u></p> <p>Healthier individuals. Less pressure on health system. Social Network. Improved cultural community.</p> <p><u>Economic Impact</u></p> <p>Financially-savvy older adults who invest, save, and spend</p>

LOGIC MODEL EXECUTIVE SUMMARY
Pilot study for Encore Center for Lifelong Enrichment

I. GENERAL INFORMATION:

Beneficiary institutional organization(s): McKimmon Center for Extension & Continuing Education

Beneficiary Agency: The Encore Center for Lifelong Enrichment

II. LONG TERM OUTCOMES: (IMPACT)

Encore members are motivated to stay healthy, engaged, and independent, and are therefore less likely to deplete the community's healthcare and other resources.

III. DESCRIPTION: (Central changes that will occur)

Encore serves over 1000 Triangle-area adults aged 50+ annually. As is the case with most lifelong learning institutes, Encore is intentionally organized so that its members help guide, promote, and develop the program. Currently there are five standing committees, two coordinators, a photo archivist, and five member-run special interest groups. Ad hoc committees are formed on a regular basis to address particular issues. All these committees and groups are staffed by members, with paid staff serving as liaisons. Overall, continual assessment of the program is developed, and recruiting of members to become more actively involved, results in a program that empowers and motivates its members to stay healthy, independent, and engaged. All of these are changes that have happened in the past and present and are expected to continue in the future.

IV. OUTCOME(S): (Measurable changes)

Encore members are motivated to stay healthy, engaged, and independent, and are therefore less likely to deplete the community's healthcare and other resources. **Survey results:** Encore comprehensive surveys (conducted every 3-4 years) will include questions related to member health and well-being. A survey conducted in 2007 asked specific questions related to health impacts. The survey was mailed to 941 members in March 2007 and had a response rate of 46%. 38% reported that Encore had a "significant positive impact" on their overall psychological well-being; 50% reported a "moderate positive impact." Twelve percent reported a neutral impact and less than 1% reported a negative impact. Similar numbers were reported regarding Encore's impact on overall physical health.

Outputs required:

1. Impact statements and surveys from members and instructors collected
2. Member involvement with program development and implementation nurtured and sustained.

1. Impact Statements from course evaluations

Sample impact statements related to health and wellness from course evaluations in the past 2 years:

- "My life is better than ever before. Over my retirement years, Encore has become – next to my family – the focus of my time. The benefits have been real, mental and physical. Thank you."
- "Encore helps provide the mental stimulation needed as I age."
- "Encore is good for my activity level and physical health – it gets me out of the house and thinking about different topics."
- "Taking Encore classes has definitely improved my health by getting me out of bed. Encore has expanded my realm of interests during my retirement years."
- "Being a recent widow, the stimulation and interest of the courses helped me personally to heal."
- "I cannot begin to express how positive Encore has been for me!" I am so grateful for the intellectual stimulation and the opportunity to interact with other bright, engaged people... Encore has been a significant blessing in 'retirement' (during which I otherwise might have gone insane)"

- “Encore has been great for me – I have a tendency to be reclusive, but Encore stimulates my curiosity and helps me to be social. So, I am healthier by staying out more often and talking with interesting people.”
- “The courses have helped with cognitive deficiencies following a left hemispheric stroke. Helps me to focus. Encore is stimulating and provokes thought and reading.”
- “As you age, many people talk of illness, doctors, pills and aches – this helps us make life and conversation more fun!”
- “I believe Encore has improved my physical problems. It helps motivate me to get out of the house.”
- “Everyone I meet these days say I look so well and happy. I say, ‘Take Encore classes.’”
- “Encore keeps me from getting depressed and isolated. Keeps my mind active and exciting.”

2. Level of engagement of members

- In a typical year, 55 members serve on standing committees.
- In a typical year, 70 members serve as class hosts (some multiple times).
- In a typical year, 15 members teach or coordinate a course for the program.
- Over the years, members have founded eight special interest groups: arts & entertainment group, movie group, book group, energy independence group, writers group, memoir-writing group, knitting group, hiking group; (the energy independence group, arts & entertainment group, memoir group have disbanded).
- Members serve on ad hoc committees: 15th anniversary planning committee, ad hoc committee on growth, ad hoc fundraising committee, strategic planning committees.
- In a typical year, 60-70 members make a contribution to the endowment.
- In a typical year, 25 members contribute to the “course bank” that provides financial aid to members.

Consumer vs. Contributor: This level of engagement is significant because it demonstrates a commitment to contribute to the program rather than simply enroll in courses and events. Members “invest” in the program and feel “empowered.”

V. ACTIVITIES:

- 80+ courses and multi-day study trips assessed through evaluations and program impact statements collected
- Comprehensive Member survey conducted in 2007
- Program marketed to community
- Members encouraged to become actively involved in the program
- Members trained and developed to serve on committees and be class hosts
- Members create programming (courses, special interest groups, etc.) to fulfill their needs
- Short-term group volunteer activities undertaken by the members

VII. RECOMMENDATION:

The designated team leader for the present project recommends the approval of this operation, and the use of resources appraised in order to execute the corresponding project.