



Participatory Learning and Teaching Organization

Strategic Action Plan 2010-2015

**Vision, Mission and Core Values
Strategic Issues and Goals
with related Appendices**



Continuing Studies
UNIVERSITY OF WISCONSIN-MADISON

www.seniorlearning.wisc.edu

Table of Contents

| | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| PLATO’s Mission, Vision and Core Values | 3 |
| PLATO’S Strategic Action Plan | |
| Introduction | 4 |
| Key Elements of the Strategic Plan | 4 |
| Issues, Goals and Recommended Actions | 5 |
| Issue 1: Enlarge and Reorganize the Board of Directors..... | 5 |
| Strategic Goal and Action..... | 5 |
| Issue 2: Develop and Use a Systematic Method of Identifying, Recruiting and Training New Leaders..... | 5 |
| Strategic Goals and Actions..... | 5-6 |
| Issue 3: Improve PLATO’s Internal and External Communications..... | 6 |
| Strategic Goals and Actions..... | 6- |
| Issue 4: Growth in Membership is Straining PLATO’s Administrative and Operational Resources | |
| Strategic Goals and Actions..... | - |
| Issue 5: Enhance and Expand PLATO Programming to Improve its Participatory Character and Meet Expectations of a Growing Membership | |
| Strategic Goals and Actions..... | - |
| Issue 6: Manage PLATO’s Relationship with UW-Madison Continuing Studies in a Mutually Advantageous Way | 10 |
| Strategic Goals and Actions..... | 10 |

Appendices 11
A Brief History of PLATO 12-13
Executive Summary of PLATO 2010 Member Survey 14
Demographic Factors Impacting PLATO15-1

PLATO Strategic Planning Committee

George Rueckert Chair

Marv Beatty
Paul Artwig
Tim Otis
Fred Ross
Judy Sadowsky
Franklin Stein

Russell Consulting, IncFacilitator

Linda and Jeffrey Russell, Co-Directors
1134 Winston Drive
Madison, WI 53 11

Strategic Planning Conference Participants

Peg Arnold
Mary Boyd
Ann Falconer
Lynn Gilchrist
Ray Griesbach
Lois Karn
Mike Lovejoy
Tim Otis
Rita Rausch
George Rueckert
Judy Sadowsky
Nancy Schultz
Franklin Stein

Marv Beatty
Edna Canfield
Peter Finch
Arnold Green
Jim Alloran
Wendy Kerr
Aleta Murray
Fred Paesel
Don Reeder
Jeffrey Russell
Mark Saltzman
Sarah Schutt
Barb Stock

Pat Becker
Ruth Diehl
Ka Foget
Bruce Gregg
Paul Artwig
Judy King
Barbara Nodine
Ved Prakash
Fred Ross
Linda Russell
Joann Savoy
Rod Smart
Ardie Thomas

PLATO's Mission, Vision and Core Values

Mission

PLATO is a participatory, member-led, learning-in-retirement organization committed to continually developing and promoting intellectual and cultural enrichment opportunities for its members in association with UW-Madison.

Vision

PLATO will provide high- quality learning, teaching and social opportunities to the Dane County senior community in close cooperation with the University of Wisconsin Madison. It will preserve its distinctive participatory character as a self-managed body with its own finances and curriculum and an atmosphere that is open and welcoming to all.

Core Values

- ◆ Foster active participation by all members in planning, scheduling and conducting learning and teaching events in a variety of formats.**
- ◆ Provide high- quality, member-designed and member-led study and discussion groups, lectures, tours and other learning events at convenient locations throughout Dane County.**
- ◆ Maintain a vigorous and creative member-driven organization with independent control of its finances, curriculum and administration in close coordination with the UW-Madison Division of Continuing Studies. Collaborate with other entities serving senior learners in Dane County.**
- ◆ Provide a welcoming social environment for new and renewing members as they learn, share and teach.**
- ◆ Keep members fully informed about PLATO's programs, operations, and finances through traditional and emerging communications media.**

PLATO's Strategic Action Plan 2010-2015

Introduction

At age 23, PLATO is at a pivotal point in its existence. It has grown from a handful of creative and dedicated members who, with support from the UW-Division of Summer Sessions, created a highly functional model of peer teaching and learning, to an organization with nearly 100 members and a broad array of programs in a variety of formats offered at multiple locations.

The combination of steady growth in membership, prospects for sustained future growth and changes in its environmental context have created both the need and the opportunity for the organization to examine its identity, its strengths and weaknesses, and its priorities.

PLATO has done this before, most recently in 2006. But in 2010 we face the prospect of an influx of retiring Baby Boomers that could outstrip our ability to operate small- and medium-sized study discussion groups. We also need to identify and mentor members with potential to lead new teaching learning initiatives as well as the overall organization. These developments called for development of a new and imaginative strategic plan.

Under the leadership of a strategic planning committee led by George Rueckert, and with the professional assistance of Russell Consulting Inc., PLATO has just completed an intensive examination of its history, its members' opinions of its effectiveness and limitations, its strengths and weaknesses, the context in which it operates today and its probable future operating environment. From this broad-based self examination we have distilled five core components of its vision and six key issues. Now it is time to move from examination to action if PLATO is to fulfill its potential in the coming years.

Key Action Elements of the Strategic Action Plan

The strategic planning process identified six strategic issues that the organization needs to pursue vigorously in the years ahead if it is to realize its vision and mission fully.

Five of these issues need to be tackled in sequence, beginning with augmenting the Board of Directors, reinvigorating leadership recruitment and training, and enhancing communications. This should be followed by an appraisal of the implications of PLATO's membership growth and the curricular and administrative alterations required to accommodate that growth. Our relationship with the UW is an issue that can be developed on a time schedule that is independent of the other five strategic issues, although it is closely tied to the UW-Madison Continuing Studies' decision not to pursue an endowment from the Osher Foundation.

Issues, Goals and Recommended Actions

Issue 1: Enlarge and reorganize the Board of Directors.

Goal A: Include among the duties of the President Elect responsibility for leadership development and create a Leadership Development Team to assist her him in that effort.

| Actions | By Whom | When |
|-----------------------------------------------------------------------------------------------------------------------------------|---------------------------|--------------------|
| Revise bylaws to make the President Elect responsible for leadership development as head of a Leadership Development Team. | Board of Directors | August 2010 |

Goal B. Enlarge the Board of Directors by amending the Bylaws to include five rather than three at-large members and making appropriate changes in their terms of office.

| Actions | By Whom | When |
|----------------------------------------------------------------------------------------------------------------|---------------------------|-----------------------|
| Review and amend PLATO's Bylaws as per Article XIII to accomplish the changes to achieve goals A and B. | Board of Directors | September 2010 |

Issue 2: Develop and use a systematic method of identifying, recruiting, training, and retaining new leaders.

Goal A. Publicize PLATO's need for good new leaders.

| Actions | By Whom | When |
|------------------------------------|-------------------------------------------------------------------------------|------------------|
| Publicize this need widely. | Board of Directors, under direction of the Leadership Development Team | Fall 2010 |

Goal B. Familiarize potential leaders with leadership opportunities to develop an interest in and a desire to serve in a leadership role.

| Actions | By Whom | When |
|----------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|------------------------------|
| Inform all coordinators of leadership opportunities and task them with communicating this information in discussion groups they lead. | Board of Directors all Coordinators | Ongoing |
| Conduct periodic informational meetings for interested potential leaders. | Leadership Development Team | Ongoing as needed |

Goal C. Train and mentor new leaders.

| Actions | By Whom | When |
|----------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|--------------------|
| Provide each leader with this strategic plan to introduce them to PLATO's history, challenges and key issues. | Committee chairs Leadership Development Team | Ongoing |
| Provide training sessions on key organizational issues for new leaders. | Leadership Development Team | Fall 2010 |
| Develop a mentorship program under experienced coordinators to work with new coordinators as they start. | Leadership Development Team Curriculum Committee | Winter 2011 |

Issue 3: Improve PLATO's internal and external communications

Goal A. Recruit and train individuals to serve on PLATO's Outreach Committee.

| Actions | By Whom | When |
|-------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|----------------------|
| Identify and recruit at least five new members and potential leaders for the committee. | Leadership Development Team Outreach Committee | April 2011 |
| Periodically reexamine and revise as appropriate the mission of the committee. | Outreach Committee | December 2010 |
| In conjunction with UW DCS, reexamine and upgrade as appropriate PLATO's current communication activities. | Outreach Committee | March 2011 |

Goal B. Enhance PLATO's website so that it becomes the medium of choice for the organization's communications.

| Actions | By Whom | When |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|----------------------------|
| Establish a Website Task Force, and review current websites from other LIR organizations around the country | Outreach Committee | January 2011 |
| Meet with UW DCS staff to determine what is possible and feasible to enhance the current website, including but not limited to information on PLATO's history, organizational structure and course offerings. | Website Task Force | March 2011 |
| Develop cost projections for enhancements and a timetable for implementation. | Outreach Committee DCS | May 2011 |
| Publish key Board and standing Committee decisions and actions through the web, the Persimmon, and other venues. | Outreach Committee | 2010 and thereafter |

Goal C. Develop a convenient means for PLATO's members to convey ideas and concerns to PLATO's leaders.

| Actions | By Whom | When |
|-----------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|------------------|
| Explore potential of proposed new website and other means to enhance communications to and from PLATO members. | Website Task Force Outreach Committee | July 2011 |

Issue 4: Growth in membership is straining the organization's administrative and operational resources.

Goal A. Identify any needed changes in financial policies and practices that continued growth will require.

| Actions | By Whom | When |
|------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|-----------------|
| PLATO treasurer and designated Board members examine fiscal impacts of growth and recommend any needed changes in fiscal policy and practice. | Treasurer and Board | May 2011 |

Goal B. Examine the administrative impact of continued growth in membership in collaboration with DCS and recommend any needed changes in policy and practice.

| Action | By Whom | When |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|--------------------|
| Board officers and DCS liaison examine present and future administrative needs of PLATO and recommend any needed adjustments in time and funding to optimize the interests of both parties in this ongoing relationship. | Board and DCS | Spring 2011 |

Issue 5: Enhance and expand programming substantially to improve its participatory character and meet the expectations of a growing membership.

Goal A. Develop and offer new and innovative programs in excess of membership growth, and incorporate new delivery systems, locations, dates and times of day.

| Actions | By Whom | When |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|------------------------|
| Expand programming from two to three time slots per day to reduce the overcrowded schedule. | Curriculum Committee | Fall 2010 |
| Introduce program offerings in January and February to fill programming void. | Curriculum Committee | an. 2012 |
| Introduce two- or three-day bus trips. | Special Events Committee Bus Trip Coordinator | Summer 2011 |
| Explore opportunities to develop participatory, member-led teaching and learning programs in outlying communities of Dane County as a part of PLATO's programmatic offerings. | Curriculum Committee | 2012 and beyond |

Goal B. Recruit and mentor new, talented coordinators.

| Actions | By Whom | When |
|---------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|--------------------------------------|
| Publicize the need for more new offerings and new course leadership ask coordinators to identify prospective coordinator candidates. | Board of Directors Curriculum Committee Outreach Committee Course Coordinators | Late summer 2010, winter 2011 |
| Provide information and support for new course coordinators. | Curriculum Committee Leadership Team | 2011 and ongoing |
| Provide a contact for new coordinators during their first and second semesters. | Curriculum Committee | 2010 Ongoing |
| Debrief first time coordinators at end of the term. | Curriculum Committee | End of each term |

Goal C. Strengthen PLATO's core value of participatory learning and teaching by achieving wider understanding and appreciation of this value among returning and new members.

| Actions | By Whom | When |
|--------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|------------------------------|
| Publicize this core value formally and informally by word of mouth. | Outreach Committee Board of Directors | Ongoing through 2015 |
| Incorporate this core value prominently in written and other communications associated with PLATO's 25th anniversary in 2012. | Officers, Board of Directors Outreach Committee | Dec. 2012 |
| Encourage coordinators to describe PLATO's participatory mode of operating at the start of each offering they lead. | Curriculum Committee | Fall 2010 and ongoing |

Issue 6: Manage PLATO's relationship with UW-Madison Continuing Studies to reinforce our strong shared commitment, clarify roles and develop a financially stable working environment.

Goal A. Develop Memoranda of Agreements that move PLATO and DCS toward multi-year agreements that promote long-term planning.

| Actions | By Whom | When |
|-----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|--------------------------------------------------|
| Establish an operational financial plan that reflects PLATO's current and projected conditions. | Treasurer | Fall 2010 Winter 2011 and ongoing |
| Negotiate with UW DCS to develop a MOA that reflects in detail costs and responsibilities of each party. | Univ. Relations Committee Board of Directors | Spring 2011 |
| Negotiate with UW DCS to develop agreements and plans that address issues beyond the terms of the MOA. | Univ. Relations Committee Board of Directors | Spring 2011 and beyond |

Goal B. Promote a strong working relationship with UW-Madison to ensure that PLATO remains an important partner in senior learning.

| Actions | By Whom | When |
|--------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|---------------------------------|
| Seek out opportunities to involve UW faculty and staff through guest lectures, etc. | Special Events Committee | an 2011 and ongoing |
| Seek out ways to be involved in UW planning, advisory and oversight committees involving senior learning. | Board of Directors | uly 2011 and ongoing |
| Identify relevant learning opportunities at UW-Madison for PLATO members and assist in publicizing them to the members. | Curriculum, Outreach, and Special Events Committees | Ongoing |

NOTE: A master file of all substantive materials produced by the committee and Russell Consulting is located in the PLATO file in the Division of Continuing Studies.

APPENDIX 1

PLATO Past and Present

A Look at Where We Came From and How We Grew
Marvin Beatty and Tim Otis

We have Bob Elsas, a CPA from Madison, to thank for our origin. He visited family in Los Angeles in 1966 and experienced UCLA's Perpetual Learning and Teaching Organization, PLATO, there. When he returned to Madison he embarked on a quest to start a similar organization here. It took persistence to sell the idea. Not until he visited Dean Garland Samson of the University of Wisconsin Division of Summer Sessions and his associate dean, Nancy Abraham, did he encounter interest and support from the university.

In October 1966 Associate Dean Abraham invited Elsas and a few friends to launch PLATO here, with strong support from the Division of Summer Sessions. There were only six people at the first organizational meeting, and four were associated with the University of Wisconsin.

Elsas and a few friends forged ahead. By the winter of 1967 PLATO was able to offer three study discussion groups and had recruited 30 members. The University of Wisconsin, through its designated liaison, Alice Dubois, did almost everything except the programming, which was developed by Elsas and his friends. Dubois arranged for leaders of the fledgling PLATO group to pitch the idea of their new organization at the Division of Summer Sessions' Guest Tea. She also designed a flyer for the organization, helped PLATO members register as UW Guest students, collected course fees, wrote news releases and articles about the new group, and more. Membership fees were initially \$3 per class, then jumped to \$15 per year. At UCLA the annual fee was \$325, so it is clear that PLATO in Madison was appealing to a different clientele than its western namesake.

Deans Samson and Abraham kept close track of the new organization. In May 1967 Dean Samson is reported in the minutes of a PLATO planning committee meeting as telling the group, more structure is needed. The founding members, led by Norman Jacobson as president, took his advice seriously, and by late in 1967 were developing a constitution, by-laws and a committee structure. During the year the group broadened its curriculum, enlarged its membership and increased its fees. In 1970 Bob Elsas, in a review of PLATO's beginnings, stated, PLATO owes a debt to its University sponsors who have subsidized its early years to provide a solid base. Deans Samson and Abraham and Advisor Dubois should be particularly mentioned.

From the start member-led study discussion groups were the heart of PLATO named the Participatory Learning and Teaching Organization. By 1968 the organization had 20 members and operated six study/discussion groups that met for five weeks each. The leaders had also developed guidelines for group coordinators. During the 1970-71 programming year PLATO held its first preview, lengthened the time study/discussion groups met

to 12 weeks, and developed a Manual of Policies and Procedures. The group had a mailing list of 125 names, 105 members and 0 active participants in programs. The organization held two distinguished lectures, one by James Doyle and one by Paul Soglin. The latter was attended by 120 members and friends.

But apparently not everyone followed the organization's procedures on time that year. UW liaison, Mary o Biechler, who succeeded Alice Dubois as UW liaison, was prodding PLATO leaders in writing on housekeeping and programmatic issues. She also proposed the organization develop a three-year rolling calendar of events something that either never happened or didn't last if it was started.

By 1 2 3 the organization was having growing pains. It operated 1 study discussion groups and a series of lectures. Mary o Biechler wrote 25 letters over her own signature recruiting speakers for PLATO's lectures. PLATO's annual membership fee was 30, and it had a balance at the UW Credit Union of 4,1 . The growing organization was holding the majority of its 1 study discussion groups at banks, libraries and senior centers.

But the size and activity of PLATO was causing workload problems for Mary o Biechler at the UW. In May 1 2 she wrote Associate Dean Patrick Runde, who replaced Associate Dean Abraham, with these concerns:

According to information I have, PLATO has come from a seedling organization almost totally self sufficient in spring 1987(25? members) to a well-rooted organization which needs nourishment from the office(150+ members) in spring 1992. Due to the size and nature now of obligations (financial, logistics, coordination, national affiliation, and curriculum) and the fact that as retired people they do not seek nor want nor expect new work assignments or administrative tasks, the questions has to be asked how much can the University of Wisconsin Madison DSS ICP invest in this organization which was fostered and encouraged in 1 .

Biechler's concerns led PLATO to fund a part-time position at the UW to help with the administrative workload. That arrangement has morphed over the years into the current UW-DCS PLATO division of membership dues in a 30 0 ratio. Since 1 Wendy Kerr has carried out the administrative duties for PLATO, and since 2001, when Biechler retired, Kerr has been the UW administrative liaison to PLATO.

In 1 3 Dean Samson retired, and was made a life member of PLATO the only one so far . e was succeeded by oward Martin.

In 1 3 4 PLATO's executive committee began regularly scheduled meetings, initiated programs in summer and raised the annual dues to 40. Programming and membership continued to grow throughout the decade, and reached 411 by 1 2000.

Space on campus for PLATO's study discussion groups has always been at a premium. In 1 the UW remodeled space at 05 University Avenue for the Division of Continu-

ing Studies. The Division then made two classrooms available at that location for PLATO's study discussion groups. In 2005 the Division relinquished the building at 405 University Avenue, and PLATO moved its study discussion groups and lectures to off campus locations throughout the city. Before space at 405 University Avenue became available for PLATO classes, there was a proposal from some in the organization that we obtain a building of our own. That initiative is still not realized, but is one some members hope will eventually become reality.

In 2001 the annual dues were raised to \$50, an amount that remains the same in 2010. Membership continued to grow. In 2003-04 it reached 546, and in 2009-10 it was 655. Programming continued to expand as well, but not as rapidly as the growth in membership.

In 2005 the Osher Foundation, a philanthropic organization with a mission of promoting lifelong learning among senior citizens, approached the UW DCS with an offer of grant money for development of a senior learning programming at the UW to be called the Osher Lifelong Learning Institute. DCS accepted the grant, began to develop and offer lecture programs and to recruit members. Sarah Schutt from DCS assumed the role of Director of Senior Learning and led the OLLI program. In 2006-07 DCS and PLATO agreed on a policy of joint membership in the two separate organizations at a cost of \$65. In 2008 the PLATO Board of Directors agreed to consolidate membership and to become a Program of OLLI. The membership fee returned to \$50 per year.

In 2008 PLATO reorganized its leadership structure by abolishing its host of ad hoc committees and establishing four larger standing committees, replacing its Executive Committee with a Board of Directors and its Manual of Policies and Procedures with formally adopted By Laws and Resolutions.

In 2009 PLATO became a nonprofit corporation registered in the state of Wisconsin, and also obtained 501(c)(3) status as a social organization with the United States Internal Revenue Service. In 2010 the Osher Foundation declined to approve the DCS application for an endowment, and relations with the Osher Foundation ended in June of that year. PLATO returned to its long-established name and continued its long-standing relationship with the UW DCS in a simpler organizational setting.

By the spring of 2010 PLATO membership had increased to 655. There were 32 study discussion groups and lectures operating for the spring term. The organization's net worth was approximately \$10,000. Because of the continuing growth in membership, the anticipation of even greater membership in the future, the need to develop more leaders within PLATO, the challenges of effectively communicating with a large membership and the need to develop more programming, PLATO held a two-day strategic planning retreat in April. It involved more than 40 members and a professional consulting firm. The issues identified and the goals and action plans that were developed at this retreat are designed to give PLATO a map for charting its direction for the next five years.

APPENDIX 2

Executive Summary of PLATO 2010 Member Survey

As part of a larger strategic planning initiative undertaken by the PLATO Board of Directors, PLATO contracted with Russell Consulting, Inc. RCI to conduct a comprehensive online assessment of PLATO member perceptions of and expectations for the organization. Of the 13 member households out of 6 members that had e-mail addresses, 3 submitted a survey for a response rate of 56%.

Demographically, 1 of these respondents had been members of PLATO for less than six years 53 of them were between the ages of 52 to 65 were women two-thirds of the respondents lived on the west southwest side of Madison and 6 of them had not served on either the PLATO board or on any of its committees in the past three years.

The vast majority of respondents indicated their primary reason for being a member of PLATO was to continue their own learning. In terms of satisfaction with PLATO's offerings, 77% of participants were either satisfied or very satisfied with previews, 86% were satisfied or very satisfied with the small discussion groups, 82% were satisfied or very satisfied with the large discussion groups, and 88% were satisfied or very satisfied with the lectures they had attended.

A significant number of respondents had not attended one or more of the types of PLATO offerings. Thirty-four percent of the respondents indicated that they had not attended previews, 42 had not attended small discussion groups, 41 had not attended large discussion groups, 34 had not attended lectures, 3 had not participated in tours, and 2 had not attended social events. The most frequent response for why a respondent had not attended any PLATO offerings in the past year was that their schedule prevented participation 60%.

When asked how important various areas of learning were e.g., art music literature, science, philosophy religion, history biography travel, etc. respondents indicated strong interest in all of the areas listed, and identified others. The rank order of respondents' preferences for PLATO's offering formats as determined by the average score for each type of format were: 1 small groups with active discussion, 2 lectures, 3 large groups with limited or no discussion, and 4) tours. When specifically asked how important it was for PLATO to keep its discussion groups small 20-25 people or less, 65 of the respondents indicated it was somewhat to very important.

Finally, the most frequently offered responses to what people liked best about PLATO were having the opportunity for continued lifelong learning and being able to meet a variety of interesting people. Respondents also offered a wide array of ideas about how PLATO could improve its offerings and its services to members.

A copy of the complete member survey is in the PLATO Strategic Planning file at UW-Madison Continuing Studies.

APPENDIX 3

Demographic Factors That Will Impact PLATO's Growth and Programs

As part of its overall approach the Strategic Planning Committee sought to identify both PLATO's current growth rate and the Dane County demographics that are likely to impact PLATO's future growth and operations as the Baby Boomers those born between 1946 and 1964 begin to retire. To complement demographic information on PLATO developed by Tim Otis and Russell Consulting, the Committee asked John Vardallas the founder and CEO of the The American Boomer Group of Madison to provide an overview at the Strategic Planning Conference of the demographics, characteristics and retirement interests of the Boomer population. The most relevant information gleaned from these various sources is summarized below.

PLATO's growth rate is already rapid

PLATO is currently in a period of relatively rapid growth. In the last five years, PLATO has grown by 50% almost entirely by word of mouth. Current projections are for membership to continue to increase by as much as 150 to 200 members per year.

Today, PLATO offers 25% more classes than it did just five years ago and the pressure for more classes and locations also is expected to continue to grow. One result is that PLATO may need to experiment with new programming concepts as membership grows.

PLATO currently has more women than men. Sixty-six percent of its members are female 40% of new members. The average age of all members is 51 new members 65 and 40% of all members report that they are not employed, versus 20% for new members.

These figures, however, are likely to be impacted significantly over the next decade by changing Madison and Dane country demographics.

Dane County's 60+ population will double in 10 years

According to the Dane County Task Force on Aging, the 60+ population in Dane Country is projected to increase by 102% in the next decade from about 50,000 in 2010 to more than 102,000 by 2020.

Underlying this increase will be the retirement of the Baby Boomers who constitute America's largest generation 70 million strong and who now are retiring in the U.S. at the rate of about 10,000 every day. Together current retirees and Boomers will own 50% of all wealth in the United States.

Boomers will have their own outlook

The Baby Boomers are very much a product of their own time. They will bring with them new perceptions not necessarily fully shared by older generations. Among the defining events that affect their outlook are these:

- ✦ **They were born during a prosperous time.**
- ✦ **They have a higher educational attainment than any previous generation.**
- ✦ **TV was an important educational source.**
- ✦ **They have enjoyed substantial leisure time.**
- ✦ **As the first "Vietnam generation" they tend to question authority.**
- ✦ **They are re-defining aging (70 is the new 60).**

Some characteristics of Boomers

Boomers are the most powerful demographic group in the U.S. in terms of their influence **and buying power. They essentially control the marketplace in lifestyle, leisure spending, healthcare, real estate ownership, finance and technology.** However, they are not caught up in one-sided consumerism. According to John Vardallas:

- ✦ **Six in 10 are always trying to learn new things.**
- ✦ **They are interested in volunteerism.**
- ✦ **They are committed to their children and to their parents.**
- ✦ **They are nostalgic and spiritual.**
- ✦ **They are enterprising and politically active.**
- ✦ **They yearn for self-fulfillment.**
- ✦ **They are avid travelers and tourists.**

Madison will be attractive

Boomers are finding their own places to retire rather than following the crowd to the Sunbelt. **Many Boomers will be moving to college towns to stay engaged, continue learning, access services, be with like-minded peers and strive to be forever young. Florida and California will no longer be the Promised Land for this new group of retirees. Instead they will be staying closer to family and to relationships they have established over the years.**

Economic factors will have a significant impact

Although Boomers are not "depression children," economic realities will have a significant impact on many of their retirement lifestyles. **Many will be working longer, delaying retirement, starting their own businesses, and updating their skills and learning. This will lead many to combine both retirement and work-work-tirement**

Boomer interests offer both opportunities and challenges for PLATO outreach

Because of their distinctive perspectives, the Boomers will be drawn to groups like PLATO but they also are likely to effect some change in the focus of the groups they do join.

Some of the Boomer characteristics that could impact PLATO are:

- ✦ **They will welcome volunteer opportunities which could offer leadership possibilities.**
- ✦ **They will want to make their time meaningful.**
- ✦ **They will seek intellectual challenges.**
- ✦ **They will look to stay involved, engaged and connected with others.**
- ✦ **They will be seeking continuing education and new information.**
- ✦ **They will be looking for groups, clubs and organizations they can connect with and using social media such as Facebook.**
- ✦ **They will react well to a focus on ego, and on staying young and active.**
- ✦ **They will respond well to messages with nostalgia and those that use retro images and promotions.**
- ✦ **The Internet offers face time opportunities. Wording doesn't match other bullet pts.**
- ✦ **They will seek various ways to add value to their lifestyle, travel and entertainment.**

What courses will be on their minds?

Current realities mean that Boomers will have financial educational programs on their mind that are not currently widely offered by PLATO. These could include such course as fundamentals of investing, long-term care, retirement and estate planning, wills and trusts, reverse mortgages, and IRAs. They also will be interested in end-of-life strategies.

There could be an increased interest in such activities as health and wellness programs, sports, music and dance, outings and field trips, social programs, cooking and gardening, and travel.

All this may eventually result in changes to PLATO's traditional discussion groups and formats, including new social networks, more hands-on courses, designer courses, shorter duration courses and travel study tours.



Continuing Studies

UNIVERSITY OF WISCONSIN-MADISON

**21 N. PARK STREET, 7 FLOOR
MADISON, WI 53 15-121
60 -262-5 23**