

**Maintaining Momentum:
A Review of the
McGill Institute for Learning in Retirement
Planning Process**

by:

Carolynn Rafman

MILR Program Coordinator

McGill University Centre for Continuing Education

Montreal, Quebec, Canada

Presented at:

TALIS 2003

Coventry, UK

October 17-19, 2003

**Maintaining Momentum:
A Review of the
McGill Institute for Learning in Retirement
Planning Process**

CONTENTS

	Page
I. Introduction: A Method for Organizational Planning	1
II. Planning the Workshops	
i. Maintaining Momentum 1: Presenting the Self-Evaluation Project	2
ii. Maintaining Momentum 2: McGill ILR Now and in the Future	3
iii. Maintaining Momentum 3: Peer Learning – 10 Years and Counting	4
iv. Maintaining Momentum 4: Everything in Moderation	4
III. Growth and Initiatives	
i. Direction of Growth	5
ii. Recommendations and Initiatives	6
iii. Other Recommendations and Follow-ups	7
IV. Maintaining Momentum 5: Flying into the Future	8

Appendix I: Member Survey 2003

Appendix II: History of MILR Study Groups and Registrations

TALIS 2003
Coventry, UK
October 17-19, 2003

Maintaining Momentum: A Review of the McGill Institute for Learning in Retirement Planning Process

by:

Carolynn Rafman
MILR Program Coordinator
McGill University Centre for Continuing Education
Montreal, Quebec, Canada

I. Introduction: A Method for Organizational Planning

Since 1989 the McGill Institute for Learning in Retirement (MILR) has attracted an enthusiastic membership. The peer learners who manage this successful program have developed a planning method that gets the membership involved and helps the leaders assess where their organization is headed. We call the planning process: ‘**Maintaining Momentum.**’ This paper describes the Maintaining Momentum workshops and examines this aspect of the MILR long-range planning strategy to (1) assess organizational growth and change; and to (2) produce effective recommendations.

Maintaining Momentum began in June 1995 as a conference to celebrate the completion of an 18-month self-evaluation project. The funding for this special Seniors’ Independence Project (SIP) came from the federal government department, Health Canada. At the conference McGill ILR launched their **Guidebook for Self-Assessment** (Lusthaus, Browne, Clark, Heller, 1995) that describes their step-by-step model for evaluation developed in collaboration with the McGill University Faculty of Education. The guidebook continues to be used by other institutes in their own planning.

Three surveys distributed in 1995, 1999 and 2003 give a snapshot of MILR membership that remains consistent: over 70 per cent have a university education; principle occupations were in education or in business; 75 per cent are fully retired; two-thirds are between 65 and 80 years; over two-thirds are women; 60 per cent have an association with McGill. (Appendix 1) Membership turnover is about 20 per cent each year and the largest influx of new members is during the fall term. Attendance has grown in three areas: the Fall 2003 Friday lectures, the Spring study groups and the Summer Wonderful Wednesdays lecture series. Enrollment in study groups for the past three fall terms (2001, 2002 and 2003) has remained stable at 625 members. About 60 per cent of members attend two study groups and attend the Friday lectures. Many members are on the premises two or three days per week during the fall term and the facilities have almost reached capacity. The result is that classrooms and common areas are congested between September and December. The demand for study groups and lectures continues to increase.

II. Planning the Workshops

When MILR opened its doors in 1989, it was an instant success. Enrollment grew rapidly (Appendix I). There was general agreement that the organization had to first concentrate on peer participation and the quality of the study groups. Later on, the issue became managing growth and long-term sustainability. For these purposes a long-range planning committee was formed in 1993 to manage the SIP self-assessment project and find out if the members supported the peer learning philosophy and its inherent operating rules. Their concerns were: optimum size, membership fees, space requirements and the mix of volunteers and paid staff. The underlying question the committee wanted to answer was: *What does MILR need to become self-sufficient?*

The Long-Range Planning Committee came up with thirty recommendations to this question during the 18-month self-evaluation. Some of the answers were: to produce a Member Handbook that emphasizes peer teaching and participatory learning; to recognize volunteers more frequently; to offer regular workshops for members to discuss issues and new ideas; and to hire a paid program coordinator.

The Long-Range Planning Committee mandate is to review and evaluate activities of the Institute and to this purpose it continues to produce surveys and bi-annual Maintaining Momentum workshops. Each workshop has a theme to inform members of an aspect of MILR that needs attention; such as, training volunteers for the office or recruiting study group moderators. Outcomes of each workshop are analyzed and presented to MILR Council for appropriate action by the designated committee. Most changes occur gradually in accord with the demands of the membership and volunteer availability.

Let us look more closely at four events to examine the effectiveness of the Maintaining Momentum workshops to raise organizational awareness and respond to members' needs.

II.i Maintaining Momentum 1: Presenting the Self-Evaluation Project

The first Maintaining Momentum conference attracted international delegates to the Delta Hotel in June 1995. Keynote speeches given by the Deputy Minister of Health Canada and eminent educators addressed the challenges of "*planning to survive and to thrive.*" As the number and proportion of retirees increase worldwide educational organizations that promote lifelong learning will be assuming greater importance. Thriving is best achieved in partnership with the public and private sectors. The added challenge for volunteer-run organizations, like MILR, is to become and remain self-sustaining.

Members of the SIP Planning Committee presented their findings from the self-study project along with the **Guidebook for Self-Assessment**. The feedback from

international delegates confirmed that self-study was a fruitful planning exercise. The event also reconfirmed that the ‘peer learning model’ adapted from Harvard ILR was instrumental in MILR’s successful growth. The Planning Committee’s concentration on three elements that are known to enhance ILR self- sustainability: ownership, community and program, sowed seeds that are still being harvested. The main benefit of Maintaining Momentum 1 being that the membership and its Council embarked upon the interactive process of self-assessment.

II.ii Maintaining Momentum 2: McGill ILR Now and in the Future

The second Maintaining Momentum workshop was designed for members. Held at McGill University’s Faculty Club in May 1997, the focus was on how to create a peer learning environment:

“To be successful an ILR needs to provide quality learning opportunities, to promote a peer learning environment, to be self-sufficient and member-led and to maintain good relations with their host university and the communities in which they operate.”

MILR had already achieved success in these areas; but the Planning Committee’s concern was: *What of the future?* A constantly changing environment has a greater impact on a membership organization which relies on part-time volunteer management who are unfamiliar with university administration.

The question posed to the conference attendees was: *“What actions should MILR consider to improve its effectiveness?”* People chose a committee table: Special events, Curriculum, Internal Communications, External Communications, Planning, Administration, General Issues. They filled three tables on Curriculum, no one chose Finance, a total of nine. This is reflective of the organization today with the Curriculum Committee being the largest committee and Finance the smallest. Perhaps the fact that MILR is self-financing and generates a surplus each year makes membership casual about financial matters. Last year’s operating ratio was 94%

Participants at each table discussed a list of issues; e.g. quality of the program; use of the McGill libraries; participation of membership; developing internet connections; attracting new members; expansion of social activities; guidance for moderators; study groups in French. Each table had to answer these questions: *“What are we doing well? What do we need to improve? What new ground should we be breaking?”* and bring ideas to the plenary session in the afternoon.

Forty-three recommendations were made with completion dates for implementation. These were presented to Council and circulated to the relevant committees for appropriate action.

II.iii Maintaining Momentum 3: Peer Learning - 10 Years and Counting

Maintaining Momentum was part of our 10th anniversary celebrations. Yearlong activities were organized along with a commemorative Newsletter. 1999 was also the United Nations International Year of the Older Person. MILR changed venues to the Maritime Hotel and members were invited to a “*brainstorming conference*” where the keynote address emphasized “*MILR is 10 Years Young!*” In the opening speeches, panelists enthused about their experiences as peer learners, from personal points of view as founding members, long-time moderators and Sunday lecturers.

The purpose of Maintaining Momentum 3 was to reinforce member commitment to peer learning. The focus was on curriculum where MM2 focused on administration. Participants were assigned to tables where they discussed the strengths and weaknesses of peer learning according to four types of study groups (the types had emerged from the SIP study): (i) academic/research based groups; (ii) appreciation groups in music, art, literature; (iii) creative writing groups and (iv) experiential. The list of topics was intended to encourage discussion on: (a) peer learning as distinct from teaching; (b) member participation and satisfaction; (c) responsibilities of moderators;(d) moderator recruitment and training; (e) study group quality; (f) criteria for classroom presentations; (g) moderator morale. The plenary session presented information on ‘*New Initiatives and New Directions*’ i.e. the Friday lecture series, the Sunday musical get-togethers and the revised five-week Spring term.

II.iv Maintaining Momentum 4: Everything in Moderation

Held in April 2002 at the Maritime Plaza Hotel, the purpose of Maintaining Momentum 4 was to encourage members to volunteer as moderators and it was very effective, judging by outcomes: 19 study group proposals were collected for the upcoming fall term, 30 topics were suggested for study groups and lectures and 10 new moderators were recruited. The other goal of the conference, to sustain the current roster of study group leaders, was reached as they were able to coach their peers and complete curriculum proposal forms.

MILR’s chronic worry is that the number of moderators will not be adequate to fill the demands of a growing population. Recruiting moderators to lead study groups is an ongoing task. One challenge is to demystify the curriculum selection process for prospective moderators. To this end, the Maintaining Momentum promotional flyer highlighted: “*Come to meet the moderators!*” The workshop promised ideas on “what it takes” to be a moderator with tips and techniques for leading a group.

The event attracted over 100 participants, the cost was low, and the lunchtime buffet was subsidized. The opening speech addressed: ‘*Why participate?*’ followed by a panel of experienced study group leaders who each spoke about the personal satisfactions moderating offered them. The closing address “*From music to travel*” highlighted diverse areas of study topics. Five administrators from Ryerson LIFE Institute (Learning Is Forever) in Toronto who were interested in our planning process attended and met with MILR administrators the following day.

III. Growth and Initiatives

The reasons for MILR's successful growth are multifaceted. MILR benefits from public demand for continuing education programs after retirement and from the increased number of early retirees who are healthy, energetic and curious. It attracts dedicated and skilled volunteers to design its program and run its operations. It is clear that Maintaining Momentum workshops are an effective method to raise awareness of organizational issues and to respond to members' needs. There is a correlation between membership growth and when the workshops were held (Appendix II).

III.i Direction of Growth

The number of MILR members, over 850 registered for 2002/03, has grown steadily since 1989. Real growth is evident by registrations for the Friday lectures and the summer Wednesdays. Members who participate in the MILR study group program are registering in increased numbers for the lecture series (only available to full-time members). Though some people want to take three groups, there are not have enough places to accommodate them. The previous limit of 15 people per study group was raised to 20 participants several years ago and this has been stretched to 27 in some classes.

Attendance at lectures has grown dramatically and this has some members worrying and asking: "*Are lectures leading MILR away from its commitment to peer learning?*" "*Does peer learning need to be redefined?*" Some believe that lectures create a community of 'passive' learners and this detracts from the peer philosophy. If lectures are given by MILR members not invited speakers, do they satisfy the peer learners? A larger auditorium was necessary for half of the 20 lectures scheduled in fall 2003. Certainly the stimulating choice of topics, such as 'Chagall's Jerusalem Windows' and 'Rediscovering China' is an attraction.

Committee chairpersons organized more volunteer get-togethers and moderator workshops to provide better opportunities for constructive communication. The number of support staff, volunteer or paid, adjusts to seasonal fluctuations. Some committees divided the workload in two between co-chairs; e.g. the Registrar and Special Events. An additional seat on Council was created for a Vice-President to assist with projects and an Information Technology committee to assist with registration. MILR can call upon the McGill Centre for Continuing Education support staff for assistance with registration and secretarial tasks during busy periods.

Space is a problem all over the university grounds. When MILR moved to new premises in 1999 a fourth classroom was added, but by 2002 classrooms were filled with 54 study groups during the fall. The current auditorium holds 60 which is inadequate for many Friday lectures. The lounge and kitchen are over-crowded during breaks with many members on premises two or three days a week.

III.ii Recommendations and Initiatives

The peer philosophy of MILR has sustained the organization and led to creative initiatives. As a look into the MILR planning process, here are four Planning Committee recommendations made in 1995 and what has transpired since then:

1. *Recommendation:* MILR should continue to emphasize peer teaching and participatory learning and maintain emphasis on academic activities.
Initiative A: Educational activities have broadened from study groups to offering lectures and workshops, such as the Friday lecture series, the Sunday Musical Get-togethers, the Wonderful Wednesdays during July and August and a computer workshop on the 'Internet Highway.'
Initiative B: Maintaining Momentum conference/workshops keep members informed and involved.
Initiative C: The Curriculum Committee did a creative simulation of a study group situation that was both amusing and informative for moderators.
2. *Recommendation:* More awareness of McGill University Continuing Education.
Initiative A: The Sue Crooks prize (to honour MILR's first Registrar) was awarded to a graduate student in Studies in Ageing. Unfortunately, after three years the Department of Social Work discontinued the certificate program and a new recipient for the prize money has yet to be found.
Initiative B: SPEAK (Seniors Practice English and Know-how) was launched for Fall 2003. This intergenerational program, under the guidance of the Executive VP, invites MILR members to speak to a classroom of students enrolled in Continuing Education intensive English courses. At a later date, the younger (the majority of whom speak Mandarin or Spanish) and older students are matched as 'conversation partners.' The start-up has been very successful on both sides.
3. *Recommendation:* Recruitment campaigns to attract retired McGill graduates and staff and early retirees.
Initiative: Even without a special campaign and low attendance at Open House events, word of mouth has kept membership growing. The 2003 survey indicates over 60% of members have some association with McGill as either alumnae, staff, faculty or through relatives (Appendix I).
4. *Recommendation:* The work of office management and reception should not be the responsibility of the elected registrar.
Initiative: The registrar has a heavy workload in addition to managing the office. This has led to stress and disagreement in the past and some volunteers resigned before completing their term. The current resolution is to divide the registrar's workload in two. One area where opinions differ is whether or not to introduce paid staff into an office staffed by volunteers.

III.iii Other Recommendations and Follow-ups

Recommendations brought to light at Maintaining Momentum workshops form the core of discussion at MILR today. They range from the practical, such as saving postage by distributing Calendars and Newsletters together while classes are in session to the general request for more opportunities to communicate.

There are frequent recommendations to recruit, reward and train moderators, and how to attract and identify new moderators from within. Moderators benefit from ongoing support and opportunities to exchange methods on group dynamics with each other. More frequent moderator meetings have responded to this need and are generally held at the commencement of each term.

A recurrent frustration expressed by moderators is that some members are inclined to just listen and not contribute to the discussion. Frequently, moderators ask: *“How do I encourage or insist that members make presentations?”* A guideline to making presentations was produced for this purpose, but is not always available.

The Planning Committee has stressed that ‘controlled growth’ is essential for MILR to survive. Though MILR is overcrowded in the fall term, no one is refused membership. There is still room to grow in the winter and spring. An Open House was held in November 2003 to attract new members for winter 2004. When the Curriculum Committee expanded the number of study groups offered in spring 2002 and 2003, enrollments rose substantially.

Job descriptions for Council members were recently updated by the Planning Committee. The By-laws stipulate each Council member has a backup. Continuity relies on the incumbent coaching her/his replacement as well as keeping the backup informed. The Executive Committee is studying the tasks performed in the office in preparation for the introduction of a new university registration system in 2004.

The relationship with the host, McGill University, was enhanced with the awarding of a prize and the intergenerational language exchange, SPEAK, which could already use some volunteers to follow-up and give feedback to the participants.

Some recommendations are still being debated and follow-ups are subject to changes in Council members. The issue is to remain successful and maintain momentum. Educational organizations experience peak periods during registration and this affects the human resources needed to keep running smoothly and efficiently. McGill University has upgraded its registration and financial systems and this compels MILR to implement changes that will impact the daily work of volunteers and paid staff. The success of this undertaking depends upon good will and engaged dialogue between MILR and McGill management.

IV. Maintaining Momentum 5: Flying into the Future

To summarize, Maintaining Momentum workshops provide a forum for MILR members to debate policy and philosophy issues outside of committee and Council meetings -- a place for members to speak and to listen. Maintaining Momentum 3 reviewed how MILR started and how we have grown. Maintaining Momentum 5, to be held in March 2004, is about what MILR expects for the future: the number of members, the space requirements, coaching for volunteers, the mix of volunteer and paid administration.

As a centre for learning, MILR also fulfills a community need for social interaction among Montreal seniors. The next five to ten years will see the first wave of baby boomers retiring about 2011.¹ A key question is: *How can MILR successfully sustain its volunteer peer management?* Though some believe membership should be capped, the pool of volunteers and moderators needs to be constantly replenished for MILR to thrive. The Institute has made itself self-sustainable by concentrating on the three elements of a peer learning organization mentioned earlier: ownership, community and program. The planning for Maintaining Momentum 5 begins from a different perspective-- MILR is no longer a small organization.

¹ **The Boomers are Coming: Trends in Older Adult Education** by Gordon Thompson, University of Saskatchewan, Dennis Foth, University of Alberta in the Canadian Journal of University Continuing Education. Vol. 29, No. 1, Spring 2003.