

#119

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Page 2: Institute Name & Time Period

Q1 **George Mason University**

Osher Lifelong Learning Institute at:

Q2

Time period for this report (e.g. July 1, 2020 – June 30, 2021)

January 1, 2021-December 31, 2021

Page 3: Paying members, fees, and membership year

Q3

The total number of unduplicated, dues-paying members for the reporting period

1052

Q4

A description of the Institute's fee structure, including membership fee(s) and fees for courses and activities that are not included with membership

450.00 annual membership
150.00 introductory membership/one term
300.00 annual membership for new members/1 year lapsed members (promotional)

Q5

How does the Institute define its membership year?

4 terms

Q6

Decreased

Has the number of dues-paying members increased, decreased, or stayed the same since the Institute's last Annual Endowment Report?

Q7

If the Institute's membership increased or decreased since its last report, what key factors contributed to the growth or decline?

Pandemic. Zoom resistance. Technology challenges. Lack of member to member recruitment opportunities.

Q8

If the Institute's membership decreased, briefly describe plans for increasing membership in the coming year.

In an effort to entice new members and regain members that have left for a year or more, the Institute created a promotional rate of 300.00. This effort has bolstered membership numbers but has not yet exceeded attrition rates.

Q9

Yes

Does the Institute also provide services to individuals who are not counted in the dues-paying membership total provided above? For example, individuals who receive complimentary memberships; attend lectures that are open to the public; pay more to take classes as non-members; or participate through fee-for-service agreements with their retirement communities.

Q10

If yes, what is the estimated total number of non-dues-paying individuals who participated in the Institute's programs or services during the reporting period? (Please provide your best estimate.)

Estimate 150 attendees/lecture, 6 free lectures per term, 4 terms= 3600 individuals are served.

Q11

If yes, please provide a brief description of how individuals who are not dues-paying members participated in or received services.

Youtube channel, AARP, Community Centers and University partnerships

Page 4: Staffing and volunteers

Q12

Office of the President/Provost/Chancellor

To which administrative unit does the Osher Institute report?

Q13

During the reporting period, have there been changes in personnel, furloughs, or adjustments to the staffing structure of the Institute?

Yes,

If you selected 'Yes' please describe::
Increased site assistants staff to support virtual classrooms. Replaced communication associate position with new staffer.

Q14

How many full-time staff(more than 30 hours per week), part-time staff(less than 30 hours per week), and work-study students (subsidized work-study program) does the Institute employ?

| | Full-time Staff | Part-time Staff | Work-Study Students |
|--------------|-----------------|-----------------|---------------------|
| Staff Number | 2 | | |

Q15

Have there been changes to the Institute's volunteer structure or the opportunities that it offers for volunteer engagement or leadership during the reporting period?

No,

If you selected 'Yes' please describe::
Volunteer engagement is holding strong, however virtual. No new innovations to report.

Q16

Approximately how many volunteers (including all volunteer roles) assisted the Institute during the reporting period?

600 teachers (50% OLLI member teachers) 300 OLLI member volunteers (leadership/program/outreach/finance/other committees)
Total: 900

Page 5: Location of classes

Q17

Number of cities/towns in which the Institute offers classes:

3

Q18

Names of the cities/towns in which the Institute offers classes:

Fairfax/Reston/Loudoun/Zoom (100 remote access members from around the country)

Q19

Have there been changes to the locations where the program is administered or where courses are offered during the reporting period?

Yes,

If you selected 'Yes' please describe::
With the advent of remote classes, teachers deliver our program from around the globe.

Q20

No

Are any changes needed for the Find an Osher Institute Near You map on the NRC website (verify location, website, phone number, etc. The pin identifies primary site)?

Page 6: Constructive developments and greatest challenges

Q21

Briefly describe the most constructive developments at the Institute during the reporting period.

Many constructive developments have occurred at the institute during 2021. Indeed, we celebrated our 30th anniversary with several special events, a special fundraising effort, updated classroom equipment to include hybrid technology, installed an ADA accessible ramp at our largest campus location, honored teachers at a special teacher appreciation event and provided \$25,000 dollars in scholarships to George Mason University students. In an effort to increase membership, OLLI Mason instituted a new promotional rate for all new members and returning lapsed members. In addition, in response to the social isolation crisis caused by the pandemic, OLLI Mason made a commitment to offering a substantial portion of our programing free and open to the public via our OLLI at George Mason University YouTube Channel and through an innovative partnership with AARP; reaching older adults in Virginia and across the nation.

Q22

Briefly describe the Institute's greatest challenges during the reporting period.

In 2021, OLLI Mason faced a number of challenges mainly related to the continued pandemic.

- Membership.
 - o Although we implemented a new promotional rate, attrition is still greater than the number of new members joining.
 - Facilities
 - o In an effort to prepare to return to in person programing with a hybrid component, OLLI Mason has expended terrific monetary and volunteer recourses to support procurement and installation new classroom equipment.
 - o As all programing in 2021 was remote, we took advantage of the vacant facilities to construct a much-needed ADA accessible ramp. Due to worldwide supply chain issues and lumber costs, that construction is still in progress.
 - Program
 - o All OLLI Mason programs in 2021 are virtual. Many instructors expressed an unwillingness to teach online so our pool of "regular" OLLI instructors. Fortunately, community and university instructors enjoy online zoom teaching so overall program offerings reduced only slightly.
 - Staff
 - o Several key staff people moved on from OLLI or changed roles within the organization. Advertising on hiring sites such as Indeed was required to recruit audiovisual staff to support the volume of online zoom classrooms.
 - o In addition to live zoom programing, OLLI Mason now records the majority of class offerings, edits and uploads to a video library storage platform. This enhancement, appreciated by our membership, is burdensome for staff and requires extra payroll expenses.
-

Page 7: Fundraising

Q23

What methods were used during the reporting period to generate charitable contributions? Please check all that apply.

- Direct-mail solicitation letters,
- Membership renewal forms included opportunity to contribute
- ,
- Identified/cultivated/solicited major-donor prospects,
- Promoted planned giving/legacy gift opportunities,
- Website provided opportunity for online giving,
- Solicited sponsorships/support from corporations

Q24

The total amount that was received in charitable contributions, beyond support from the Osher Foundation, for the Institute's last full fiscal year. Please include charitable gifts, grants, and sponsorships only. (The total should not include support received from the host institution, funds generated from membership dues or program fees, or the sale of tickets to events, auction items, or other goods and services. Report planned gifts separately in the next question.) Answer must be a whole number with no \$, commas, etc.

45726

Q25

Has the Institute received any planned gifts or written confirmation of planned giving commitments? If so, how many planned gifts have been funded/received? How many future planned gift commitments is the Institute aware of?

| | (no label) |
|---|------------|
| Number of planned gifts funded/received | 1 |
| Number of future planned gift commitments | |

Q26

What percent of the Institute's members contributed to the annual fundraising campaign of the Institute?

25.4%

Page 8: Questions about your Institute's endowment

Q27

The current market value of the Institute's Osher Endowment:

Market Value: **\$2,124,403**
 As of mm/dd/yy: **12/31/2021**

Q28

The market value of the Osher Lifelong Learning Endowment as of the beginning of the host institution's 2020-21 fiscal year:

\$1,758,921

Q29

The market value of the Osher Lifelong Learning Endowment as of the beginning of the host institution's 2021-22 fiscal year:

\$2,087,030

Q30

The total amount that has been distributed from the Osher Lifelong Learning Endowment for the 2020-21 fiscal year:

\$87,946.05

Q31

The total amount that either has been or will be distributed from the Osher Lifelong Learning Endowment for the 2021-22 fiscal year (based on market value at start of FY2020):

Minimum distribution will be \$104,352

Q32

Is the timing of your annual reporting still convenient for you to provide the most accurate yearly information? If not, please indicate what month of the year would work best for your Osher Institute.

yes

Q33

Yes, print and mail

Does the Institute print and mail course catalogs/brochures?

Q34

Contact information for the program director or person with primary responsibility for the Institute's operations:

Name: **Jennifer Disano**
Job Title: **Executive Director**
Address: **4210 ROBERTS RD**
City/Town: **FAIRFAX**
State: **VA**
ZIP: **22032-1028**
Email Address: **jdisano@gmu.edu**
Phone Number: **7035033384**

Q35

Contact information for the dean or academic administrator who oversees the division that administers the Institute:

Name: **Mark Ginsberg**
Address: **4400 University Drive**
City/Town: **Fairfax**
State: **VA**
ZIP: **22032**
Email Address: **mginsber@gmu.edu**

Q36

Contact information for other employees/staff at your Osher Institute to receive communications from the National Resource Center:

Name: **Susan Todenhoft**
Job Title: **Administrator**
Email Address: **olli@gmu.edu**
Phone Number: **7035033384**

Q37

Respondent skipped this question

Contact information for other employees/staff at your Osher Institute to receive communications from the National Resource Center:

Q38

Respondent skipped this question

Contact information for other employees/staff at your Osher Institute to receive communications from the National Resource Center:
