University of Pittsburgh

OSHER LIFELONG LEARNING INSTITUTE

2014 – 2015

Case for Support

Celebrating our 10 year anniversary!
# Table of Contents

- OLLI at Pitt ................................................................. 2
- Opportunities for Enhancing our Program ........................................ 2
- What is Required to Seize our Program Opportunities ................................ 4
- Supporting OLLI at Pitt ..................................................... 5
- Ways to Give ..................................................................... 5
- A History of Osher Lifelong Learning Institutes ........................................... 6
- OLLI at Pitt – Our Story ................................................................. 8
- Frequently Asked Questions Regarding the OLLI at Pitt Fundraising Program ............ 9
OLLI at Pitt

The Osher Lifelong Learning Institute (OLLI) at the University of Pittsburgh, which will celebrate its tenth anniversary in January 2015, is a vibrant program with a strong foundation on which it continues to build. OLLI has over 1100 members from across the greater Pittsburgh region. With over 80 courses per term and hundreds of undergraduate audit courses to choose from, there are multiple opportunities for adults 50 and older to continue learning throughout their lives. The University setting provides OLLI members with unique cultural, social, and intellectual experiences which allow them to learn, grow, and thrive.

Each year, OLLI at Pitt offers over 240 courses, in a wide array of topics. For the cost of one term membership, members can take an unlimited number of courses each term. Recent courses include “Forensic Science” taught by Dr. Cyril Wecht, noted forensic pathologist, attorney, and medical-legal consultant and “The Magic and Mystery of Macbeth” taught by PICT Classic Theatre’s Director Alan Stanford. The Macbeth course included an after performance conversation with the Director and cast. We also have a course entitled “Meet the Authors”, which recently featured MacArthur Fellowship winner, Terrance Hayes. In addition, we offer instruction in three different languages (French, Italian, and Spanish) and offered at three different fluency levels.

In addition to the unique OLLI courses, more than 150 OLLI members have taken advantage of the opportunity to audit undergraduate courses throughout the university. OLLI members have audited courses in departments such as History, Jewish Studies, English, Film Studies, and Biological Sciences.

OLLI not only offers courses, but also enrichment opportunities that provide learning and cultural opportunities for members. These opportunities include special events and day trips, local tours, access to the PittArts Cheap Seats program and university libraries, and much more. In addition to the benefits of membership, OLLI members can also engage and support OLLI in a number of ways through serving on a committee, volunteering at events, and donating to the organization. There are five main OLLI committees that help support the program: Advisory, Curriculum, Fundraising, Marketing, and Membership. Members may also serve as OLLI Ambassadors, who speak about the benefits of OLLI to groups and individuals in the surrounding communities. Finally, many of our members generously provide financial support to the program.

Opportunities for Enhancing our Program

Although OLLI has been very successful over its first 10 years at the University of Pittsburgh, we continue to seek opportunities to enhance and grow the program. There are three main opportunities we plan to take advantage of: development of new
activities and courses, establishing new marketing activities to increase the size and
diversity of our membership, and implementing an annual fundraising program to
support these new initiatives and the on-going operations of the program.

The first opportunity OLLI has is to increase the number of courses we offer. We cannot
offer more courses without increasing our membership, thereby receiving additional
funds. As our membership increases, we not only can increase the number of course
offerings, but we can also offer advanced courses allowing students to delve deeper into
subjects.

In addition to the courses, we also seek to offer additional programming that meets the
interests of members. These programs include overnight trips to regional cultural and
educational sites, evening lectures, and more technical classes, such as computer
instruction. We also plan to explore partnerships with other organizations in order to
offer programs we cannot due to space and equipment limitations.

A second opportunity that exists is to add additional members to OLLI. One way we can
increase membership is through implementing a marketing strategy. We want to shed
the “best kept secret” label and instead adopt the label of “Accessible to all, enjoyed by
many.” Currently, the majority of our marketing efforts are by word of mouth. While we
have recruited many members this way, this approach only allows us to recruit people
who already know someone in our program. Growing our marketing strategy will
provide a huge opportunity for us to reach out to new potential members who may
have not heard of us before.

We also seek to increase the diversity of our membership. Making the university
experience accessible and available to all, regardless of educational background, gender,
race, socioeconomic status, and geography is a goal of Pitt and of the OLLI program.
There are many ways to achieve this, but we plan to focus on: hosting programs and
courses in various neighborhoods and possibly developing satellite sites in Pittsburgh, its
surrounding areas, and even on Pitt’s regional campuses.

The final opportunity is to increase our annual operating funds by implementing an
annual fundraising program led by our Fundraising Committee. This fundraising program
will provide the financial resources available for programming beyond our membership
fees and our current endowment income. As we commit to this fundraising program, it
is our hope that the Osher Foundation will also consider an additional grant of $1 million
for our endowment.

This academic year (2014-2015) is the only opportunity we have to achieve the
membership and resource development milestones necessary to be eligible to apply for
a second endowment grant. OLLI received its first million dollar endowment in 2007,
which has generated at least $35,000 of funds each year for OLLI operations. Receiving
the second million dollar endowment grant would double our operating proceeds from
the endowment. These funds could support the opportunities listed above, including increasing course offerings, outreach to potential members in a variety of communities, hiring additional staff to better support our membership of over 1100 individuals, and much more.

The opportunity to be eligible for a second million dollar endowment from the Osher Foundation has a time limit. The Osher Foundation is closing its funding doors in the fall of 2015. While we have already achieved the membership milestone in this academic year, we must raise $20,000 with a minimum of 15% of the OLLI membership making a personal financial donation by June 2015 in order to be eligible to apply for the second million dollar endowment.

**What is required to seize these opportunities?**

The first three opportunities described above will require the membership, especially the committees, to plan and implement strategies to make those opportunities into realities for OLLI. With input from members and the committees, OLLI has developed a three-year strategic plan to allow OLLI to take advantage of each of these opportunities. The development of an annual fundraising program will enable OLLI to support increasing course and program offerings as well as expanding our outreach and diversifying our membership.

To be eligible for the second million dollar endowment, the Osher Foundation has established three milestones we must achieve. The first milestone is to maintain a membership of at least 1000 members annually. As of September 2014, we have over 1000 members; we are 90 members above where we were at the end of fall 2013.

The next two milestones require individual OLLI members to personally support the program with a financial donation. The Osher Foundation has stated that in order to be eligible to apply for the second million dollar endowment, OLLI at Pitt must:

1. secure $20,000 in donations from individuals; and
2. 15% of the OLLI at Pitt membership must donate.

Achieving both milestones is crucial to demonstrating to the Osher Foundation that OLLI has established an on-going culture of philanthropy. Demonstrating broad member participation in this endeavor is just as significant as meeting the total amount for individual donations. Therefore, regardless of what amount a member can afford, it will still be a significant contribution to meeting these milestones.
Supporting OLLI at Pitt

To achieve our goal, our Fundraising Committee recognizes we will need gifts at a variety of levels. In consultation with Pitt’s Office of Institutional Advancement, the committee anticipates we will need the following number of gifts at each prescribed level to achieve our goal. Having first made their own individual gifts, the committee is now inviting OLLI members to make a donation.

Ideally, all of our members will donate an amount that they can afford, that is significant to them and that represents the value, as both a personal and community resource, that they place on the program.

To achieve our goal of $20,000 before March 31, 2015, we anticipate members needing to give at the following levels:

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Ways to Give
Please consider making your gift today. Donations – of all sizes – ensure that OLLI at Pitt will continue to grow and thrive. So whether you have been contributing to OLLI at Pitt for several years or you are making your first gift to OLLI, you can make a difference by making your gift today.

PAYMENT OPTIONS
You can send your gift to OLLI at Pitt online, by mail, or pay by phone, and it can be paid with cash, a credit card, or a check. Gifts of appreciated stocks and mutual funds can also be made.

MATCHING GIFTS
Many individuals are able to leverage their giving by participating in their employer’s matching gift program. If you are unsure if your employer has a matching gift program please contact Amy Janocha at aij19@pitt.edu or (412) 624-5847.
HONORARY AND MEMORIAL GIFTS
You can honor or remember a friend, colleague, or loved one when you make a gift to OLLI at Pitt.

PLANNED GIFTS
Planned gifts allow individuals to support programs that have been meaningful to them and are valuable to others. Bequests and beneficiary designations on life insurance policies and retirement accounts are two very popular and convenient options that individuals choose when they wish to extend their generosity beyond their lifetime. If you would like to learn more about these options for supporting OLLI at Pitt or other options, please contact Tom Golightly at twg3@pitt.edu or (412) 624-3201.

Jennifer L. Engel
Director, Osher Lifelong Learning Institute
1400 Wesley W. Posvar Hall
230 S. Bouquet Street
Pittsburgh, PA 15260
Phone: 412-624-7072
engeljl@pitt.edu

Kate Bayer
OLLI Fundraising Committee Chair
kateb1950@gmail.com

A History of Osher Lifelong Learning Institutes
Some members wonder why and how the Bernard Osher Foundation supports the Osher Lifelong Learning Institutes. In early 2001, the Foundation provided an endowment grant to the University of Southern Maine, which had a successful “Senior College” in operation. (Mr. Osher is originally from Maine. The Foundation is located in San Francisco.) This gift provided additional opportunity for the University to improve and extend the excellent programs it was already offering. “Senior College” changed its name to the “Osher Lifelong Learning Institute.”

Next, contact was made with Sonoma State University, a member of the California State University system, which planned to model its lifelong learning program on the highly-respected Fromm Institute at the University of San Francisco. In the summer of 2001, the Foundation awarded Sonoma State University a $100,000 grant with up to two renewals at the same amount assuming progress in establishing and developing a lifelong learning program.

During the fall and winter of 2001, the Maine and Sonoma programs continued to make excellent progress in serving seasoned adults in their respective communities. The
Foundation was pleased with the results and decided to join the “lifelong learning” field in a significant fashion. The concept of a network of Osher Lifelong Learning Institutes was compelling, and requests for proposals were sent to the remaining campuses in the California State University (CSU) system as well as to those in the University of California (UC) system.

In November 2002, the Foundation Board awarded initial grants of $100,000 to ten campuses in the CSU and UC systems. A separate award was made to the University of Vermont. In February 2003, four more CSU and UC campuses were awarded grants along with the University of Hawaii at Manoa. With these additional grantees, the Foundation was supporting Osher Lifelong Learning Institutes on 18 campuses in four states. In April 2003, the outstanding progress demonstrated by Sonoma State University led to an endowment grant along with its third year of $100,000 in operating grant support.

In an effort to expand and further diversify the network of Osher Lifelong Learning Institutes, another 23 colleges and universities in California and across the nation were awarded first-year operating grants of $100,000 in February 2004.

In June 2004, the Foundation awarded grants to University Pittsburgh and six other sites. With that funding we began planning our programming and were ready to unveil the Osher Lifelong Learning Institute at Pitt with the spring term in January 2005. In 2007, the Osher Lifelong Learning Institute at Pitt was awarded a million dollar endowment to provide operating support due to the successful growth and implementation.

Although most grants initially were given to start-up programs, the Foundation was interested as well in helping to strengthen existing programs. In subsequent grant cycles, many well established lifelong learning programs were funded and became Osher Lifelong Learning Institutes. The Foundation continues to support 119 OLLIs in 50 states and the District of Columbia. OLLI at Pitt is one of 25 OLLIs that have been endowed by the Bernard Osher Foundation. We were the only OLLI in Pennsylvania until 2006. Now CMU, Widener University, and Penn State have OLLIs. The Foundation also supports a National Resource Center that has recently been relocated to Northwestern University.

There are a few stipulations that the Foundation requires for the OLLIs that receive funding: the OLLI must be part of an administrative unit on a campus, it must require membership, and it must use the name Osher Lifelong Learning Institute. The programming should be liberal arts based but they have no requirements for the number or length of courses, whether faculty is paid or volunteer, or for the amount of fees charged. The OLLIs can decide the format that works best in their communities. And you’ll find in looking over the Web sites of other Osher Institutes that there are 119
models in use! You can find their locations and links to Web sites at the Osher Lifelong Learning Institute National Resource Center, www.osher.net.

Bernard Osher, a businessman, and his wife, the Honorable Barbro Osher, Consul General of Sweden in San Francisco, are both actively involved in the programs of the Foundation. You can find out more about the Oshers and the Osher Foundation at its Web site www.osherfoundation.org.)

**OLLI at Pitt – Our Story**

OLLI at Pitt was established through a $100,000 grant from the Bernard Osher Foundation received by the College of General Studies in July 2004. The grant enabled the college to greatly broaden the scope of programming available to adults ages 55 and older. Since 1974, the College of General Studies offered older adults the opportunity to audit undergraduate courses through a program first called the College Over Sixty then the Third Age Learning Community. The new Osher Lifelong Learning Institute features both undergraduate course auditing and a new type of program—five-week OLLI courses just for members.

The inaugural term for OLLI was spring 2005. At that time OLLI at Pitt was one of 48 OLLIs at colleges and universities throughout the country and the only OLLI in Pennsylvania. That first term we offered 19 OLLI courses and had 121 full members and 187 associate members.

The Bernard Osher Foundation supported our program with a $100,000 annual grant for three years. In June of 2007, we were awarded a $1 million endowment by the Foundation.

Now, we offer over 80 OLLI courses each term and have more than 1,100 members during the academic year. By 2014, we were one of 119 OLLIs throughout the country, including five in Pennsylvania. In addition to Pitt, the others in the state are located at CMU, Penn State, Temple, and Widener.
Frequently Asked Questions Regarding OLLI at Pitt’s Fundraising Program

● **Is the second million dollar endowment guaranteed if we raise the money?**

Unfortunately, the second million dollar endowment it is not a guarantee. In order to be eligible to apply for the endowment grant, we have to meet a few milestones. The Osher Foundation would like to see us raise $20,000 from individual members and have at least 15% of our members contribute financially to our program (170 different individuals).

If we achieve those milestones, we will be eligible to apply for the second million dollar endowment. If we receive it, the second endowment will generate between $35,000 and $50,000 additional per year for our program.

The reason this is so important now is because the Osher Foundation is closing its funding doors in December 2015. This is the last fiscal year (July 2014-June 2015) for us to achieve these goals.

● **How do I know my donation goes to OLLI and not to the university?**

OLLI staff are working very closely with Pitt’s Office of Institutional Advancement to ensure that we receive your gift. We have developed our own pledge sheets, there is a dedicated site to give directly to OLLI (http://www.giveto.pitt.edu/osopher), and our pledge cards are specific to OLLI. If you give through one of these methods, it will be guaranteed to go to OLLI. You can also write on the check memo “OLLI” or “Osher”.

The pledge form also helps us track that you want the donation to go to OLLI because it allows us to follow up with our contacts in Institutional Advancement. In addition, you will receive a thank you from both the university for your donation (tax purposes) and one from OLLI about 6 weeks later which will confirm your donation went to OLLI.

● **So, if all 1100 members donate $20, we’ll meet both goals, right?**

That would be true. However, all of our members do not have the capacity to donate any amount. In addition, the membership changes every term and a large portion have only recently joined the program.

● **Why should I donate to OLLI when I pay a membership fee?**

Membership fees do account for a large portion of the actual financial budget. However, they do not cover everything. Membership fees account for around 70% of the income that is required to run the OLLI program. This does not account for the
amount of support we receive from the University through administrative and overhead support, which if it was an actual cost to us would be in the hundreds of thousands of dollars and would comprise more than half of the OLLI operating budget.

- **Where does my money go? How is my money spent?**

  Your donation will support the operations of the OLLI program. It will be used to help cover expenses such as supplies and copies for courses, marketing materials to recruit prospective members, scholarships for individuals who cannot afford the program, and instructor fees.

- **I will give this year to help receive the endowment. But next year, you will not need me to give, right?**

  No, donations are an important part of the income side of the OLLI budget and necessary to sustain the program next year and into the future. Your support will be needed as much next year as this year.

- **Why doesn’t Pitt just pay for the difference?**

  Pitt very generously supports OLLI program in a multitude of ways. Some of the ways that Pitt supports OLLI at Pitt through overhead and operating costs include free rooms, access to Pitt benefits for members (like Cheap Seats), insurance, admin support (payroll, financial, marketing, IT), and a brand new space. In addition, the Osher Foundation has clearly stated that it believes the success of the program includes both the university and the members supporting the program.

- **Can my gift (either name or donation amount) be anonymous?**

  Yes, both your name and donation can be anonymous. If you desire either, please just note it on the pledge form or in your communication. Regardless of what you choose, members of the OLLI Fundraising Committee will not be aware of what you give.

- **What are the different ways to give?**

  There are a number of ways to give, most of which are listed on the pledge form. There are other ways to give (stock as an example). If you choose to donate that way, we can connect you to someone who deals exclusively with those types of donations to ensure your donation is handled appropriately and thoroughly.