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**COMPLETE**

**Collector:** Web Link 1 (Web Link)  
**Started:** Monday, January 22, 2018 9:56:06 AM  
**Last Modified:** Monday, January 22, 2018 10:16:04 AM  
**Time Spent:** 00:19:58  
**IP Address:** 96.231.36.24

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Page 2: Institute Name & Time Period

**Q1** Osher Lifelong Learning Institute at:

George Mason University

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**Q2** Time period for this report (e.g. July 1, 2016 – June 30, 2017)

January 1, 2017-December 31, 2017

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**Q3** What year was the Institute originally established (prior to Osher Foundation funding, if applicable)?

1991

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Page 3: Contact Information

**Q4** Contact information of the person with primary responsibility for your Institute's management:

Name:	<b>Jennifer Disano</b>
Job Title:	<b>Executive Director</b>
Address:	<b>4210 Roberts Road</b>
City/Town:	<b>Fairfax</b>
State:	<b>VA</b>
ZIP:	<b>22030</b>
Email Address:	<b>jdisano@gmu.edu</b>
Phone Number:	<b>7035033384</b>

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**Q5** The name and contact information of the person the Osher Foundation should contact with questions about the Institute's annual report if different from the person identified in Q3 above:

**Respondent skipped this question**

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Annual Endowment Report Questionnaire - 2016-2017

**Q6** 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**

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**Q7** Contact information for other employees/staff at your Osher Institute to receive communications from the National Resource Center: **Respondent skipped this question**

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**Q8** Contact information for other employees/staff at your Osher Institute to receive communications from the National Resource Center: **Respondent skipped this question**

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Page 4: Paying members, fees, and membership year

**Q9** The total number of unduplicated, dues-paying members for the reporting period

1143

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**Q10** Which category describes the Institute's fee structure?

**All-inclusive membership fee** ,

If other (please specify):

one-time, one-term 150.00 introductory rate

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**Q11** A description of the Institute's fee structure, including membership fee(s) and fees for courses and activities that are not included with membership

425.00/annual

150/introductory \*one term only

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**Q12** How does your Institute define its membership year?

4 total consecutive terms

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**Q13** Has the number of dues-paying members increased, decreased, or stayed the same since the Institute's last Annual Endowment Report?

**Decreased**

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**Q14** If the Institute's membership increased or decreased since its last report, what key factors contributed to the growth or decline?

Winter term 2016, OLLI raised dues \$50.00 to cover expenses of our expanded program. In 2017, OLLI experienced a drop in membership equivalent to 45 members. The loss of membership could be an anomaly (as we've grown steadily for many years) however, the dues increase seems a likely cause. In response to the declining membership, the 2018 budget has been cut considerably. Efforts are ongoing to regain members through an aggressive marketing campaign and internal call to encourage members to bring a friend. Hopefully, 2018 will bring us back up to normal levels of growth.

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Page 5: Staffing and volunteers

**Q15** Have there been changes in personnel or adjustments to the staffing structure of the Institute during the reporting period?

**Yes,**

If you selected 'Yes' please describe::

Program Associate Retired. Hired new Program Associate

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**Q16** How many full-time (more than 30 hours per week) and part-time (less than 30 hours per week) staff does the Institute employ?

	Full-time Staff	Part-time Staff
Staff Number	1	10

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**Q17** 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**

**Q18** Approximately how many volunteers assisted the Institute during the reporting period?

over 400

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Page 6: Location of classes

**Q19** Number of cities/towns in which the Institute offers classes: **3**

**Q20** Names of the cities/towns in which the Institute offers classes:

Fairfax, Sterling, Reston

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**Q21** Have there been changes to the locations where the program is administered or where courses are offered during the reporting period? **No**

**Q22** Are any changes needed for the "Find an OLLI Near You" map on the NRC website (<http://nrc.northwestern.edu/find-an-olli-near-you/>)? **No**

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**Q23** Does the Institute offer any online or distance learning opportunities? **No**

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Page 7: Constructive developments and greatest challenges

**Q24** Please briefly describe the most constructive developments at the Institute during the reporting period.

The organization restructured the staff responsibilities to create two program associate positions. This change was needed to provide excellence in service of our ever growing program. One associate is responsible for one-time offerings and the other is responsible for multi-session courses. This separation of duties allows for more streamlined workloads and efficiency of communications between volunteers and staff.

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**Q25** Please briefly describe the Institute's greatest challenges during the reporting period.

Loss of membership was the greatest challenge; see response #14. Secondly, the organization pays a considerable fee to a local pool for the use of their parking lot. Without the use of the parking lot we would not be able to conduct our program at that site. The site is in a residential setting and if not for our need, the pool would not be able to generate income off the parking lot. The fee is exorbitant at 20K per year and is our largest facilities related cost. The contract came up for renewal in 2017 and the pool was after more money. It took many weeks of negotiating but OLLI was able to retain the original rate for the next five years without escalation. This expense is a burden to our operations and a frustration to the Director as both organizations are non-profits supporting the community interest, yet, there is a clear imbalance as to the monetary benefit from the relationship.

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Page 8: Fundraising

**Q26** What methods were used during the reporting period to generate charitable contributions? Please check all that apply.

**Direct-mail solicitation letters** ,  
**Website provided opportunity for online giving**

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**Q27** The approximate 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. Planned gifts should be reported separately in the next question below.)

**\$25,000 - \$49,999**

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**Q28** Has the Institute received any planned gifts or written confirmation of planned giving commitments? If so, how many has it received cumulatively to date?

n/a

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Page 9: Technology Platforms

**Q29** Which online registration system does the Institute use, if any? **Lumens/Augusoft**

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Page 10: Questions about your Institute's endowment

**Q30** The current market value of the Institute's Osher Endowment:

Market Value: **1,792,532.17**

As of dd/mm/yy: **7/1/17**

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**Q31** The market value of the Osher Lifelong Learning Endowment as of the beginning of the host institution's 2016-17 fiscal year:

7/1/2016 \$1,715,731.80

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**Q32** The market value of the Osher Lifelong Learning Endowment as of the beginning of the host institution's 2017-18 fiscal year:

7/1/17 \$1,792,532.17

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**Q33** The total amount that has been distributed from the Osher Lifelong Learning Endowment for the 2016-17 fiscal year:

\$85,786.59 6/30/17

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**Q34** The total amount that either has been or will be distributed from the Osher Lifelong Learning Endowment for the 2017-18 fiscal year:

\$89,626.61 should be distributed at 6/30/18

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**Q35** 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

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**Q36** Does the Institute mail printed course catalogs/brochures? **Yes**

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