OLLI at Stony Brook University
2015-2016 Annual Report

Membership Year: July 1, 2015-June 30, 2016

Membership Fee:
The annual fee of $325 entitles each paid member to register for up to eight (8) workshops per semester in both fall and spring, with unlimited workshop selections based on availability in the June activities program. This fee also entitles members to exclusive special events, trips, luncheons and dinners for an added cost.

Additional 2015-2016 Events:

Fall 2015
Nov. 11 - Improvements to Successful Resuscitation of Cardiac Arrest Patients - Cost: FREE
Nov. 21 - The Producers Musical - Cost: $52.00
Dec. 8 - Holiday Luncheon - Cost: $45.00

Spring 2016
Feb. 12 - Long Island Museum - Guided Tour of the Carriage Museum (rescheduled) - Cost: FREE
Feb. 15 - Storm King Art Center and Lunch at the River Grill - Cost: $63.00
March 23 - Museum Mile and Backstage at the Metropolitan Opera House - Cost: $45.00.
May 10 - Spring Dinner at the Watermill - Cost: $45.00

Total paying members: 1066

Administrative unit to which OLLI reports: The School of Professional Development

School of Professional Development Administration:
Dr. Charles Taber, Vice Provost for Graduate and Professional Education
Dr. Ken Lindblom, Associate Dean
Carolyn Jankowski, Assistant Dean
Diane Perillo, Assistant Director of Finance and Administration

OLLI Contact Information:
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OLLI/SPD Staff:

There are 2 full time staff: a Director and an Assistant Director; Part time: an Instructional Support Technician (40%) and 1-2 Graduate Students (at 25-29 hours per week). Staff from SPD support the program for administrative purposes that include oversight, budget and web design.

Volunteers:

The major volunteer efforts come from the following committees on a very regular basis and are approximately 100 in total: The OLLI Advisory Board, Curriculum Committee, Fundraising Committee, Special Events and Arts Committee, Member Relations and Support Committee, and Sunshine Committee. Ad hoc committees and smaller groups are brought together throughout the year and can total upwards of another 75 members per event. The workshop leaders and co-leaders who volunteer to lead our workshops each term add another 125 members to the total number of volunteers engaged in the program. A comprehensive volunteer pool of approximately 300 members can be drawn upon to help support the organization.

Locations:

OLLI holds programs in Stony Brook, East Setauket, and South Setauket as part of the local Three Village Community serviced by Stony Brook University.

Constructive Developments during this reporting period:

A number of developments were put into place during the 2015-2016 year but the most constructive for this report include (1) the development of new OLLI Policies and Procedures, (2) a revision to the organizational structure, (3) continuing to implement the fundraising plan and working towards becoming more financially sound, (4) access to larger classroom space on campus that helped to greatly reduce waitlists and improve member satisfaction and lastly (5) support from the Osher Foundation in the form of grants to the Stony Brook Foundation to support OLLI, advice, and other funding opportunities.

Challenges during this reporting period:

The greatest challenges for this reporting period involved (1) membership’s understanding of the program’s organizational structure and their roles that required the development of a University Policies and Procedures document and (2) the need to show sustainable growth, both of which were required to pursue a second endowment from the Osher Foundation to the Stony Brook Foundation to support the OLLI program at Stony Brook University.

After numerous meetings and discussions between all of the stakeholders, the final outcome resulted in
volunteer, University and staff leadership who became more united thanks to the creation of a well-defined set of University Policies and Procedures for the OLLI program. These documents clearly identified OLLI as a University program under the School of Professional Development. The former Executive Board was renamed the OLLI Advisory Board to clarify their role as advisors to the program. The by-laws were renamed and revised significantly, assisted by feedback from the membership and examples and guidance from the Osher Foundation’s National Resource Center. The new Policies and Procedures were reviewed and approved by the new OLLI Advisory Board, the Osher Foundation and Stony Brook University leadership. The final revision was signed by Dr. Charles Taber and OLLI Advisory Board President Jeff Hollander in May, 2016 and was subsequently implemented for the 2016-2017 membership year.

The problem of membership growth was also an issue due to capacity limitations of the space OLLI was already using on campus and the limited staffing resources. With classrooms allocated due to unused space after the University’s enrollment period ended, the issue began to improve, increasing the number of members that could be enrolled on campus and reducing waitlists. Staffing remains an issue but improved slightly with an SPD staff added at 40% of effort. For new growth, newspaper ads were taken out in the local Three Village area papers and notices were included in all of the August weekly Campus Announcements postings. These announcements are being sent to the entire campus community, including emeritus faculty, retirees, and affiliates. The ability to grow became possible with access to larger classroom space in this 2015-2016 reporting year. More seats will create the ability to accept up to 100 more members for the upcoming year.

Fundraising:
As a program of the University, OLLI must maintain a fiscally sound, sustainable program that supports the mission of the University regarding community outreach and lifelong learning. OLLI’s fundraising efforts revealed the financial commitment of members who were willing to invest in the program. It was a learning process for all involved but with wonderful outcomes. The first year endowment requirement by the Osher Foundation to raise $15,000 by 10% of the membership was a success. Additional monies were generated beyond that membership base amount as well (17% membership giving) from outside sponsors and benefactors for a total fundraising amount of $20,254 in calendar year 2015. The 2016 fundraising program is ongoing and all raised monies will be included in the 2016 year end totals. Giving back to the organization can result in great change. With the monies donated, a more robust OLLI program has been naturally occurring, with increased attendance at annual events and workshops through new space rental options, improvements to classrooms and the addition of an OLLI Lounge, an improved fundraising plan and strategies for marketing and awareness, to name a few.

Fundraising Methods:
A fundraising campaign was fully implemented at the start of the 2015-2016 membership year. The “Give to OLLI” feature on the website was introduced to new members and re-introduced to continuing
members as a way to support the program in appreciation of its value and to keep costs down. Letters from the OLLI President and the OLLI Director, testimonials from members who gave and fundraising email messages were sent throughout the year during specific times in order to emphasize need (example - during Thanksgiving time, the email message focused on “giving thanks to OLLI” by financially supporting the program and in January - “Start the new year off right with a gift to OLLI”).

The campaign included purchasing OLLI imprinted items for giveaways and recognition. OLLI wine glasses, carrying bags and logo inspired clothing all help to advertise the program and increase awareness.

Stony Brook University’s Office of Advancement is very supportive of the fundraising effort and have provided a significant amount of advice and support to help OLLI meet its $15,000 endowment requirement goal. Information about the best time to send out emails, how to do a letter campaign, how to recognize donors, etc. were all part of the support. A letter from the University’s Sr. Vice President for Advancement was obtained to support the second endowment proposal to show the commitment of the Stony Brook Foundation to this project and the program as a whole.

Registration:
Registration and enrollment was also very successful in this time period. During each of the registration periods (fall and spring), OLLI receives between 5000-6000 requests for workshops from its 1000+ members. In the past, waitlists have been problematic given the limited size of the classrooms available to OLLI. In 2015-2016, the Registrar worked with OLLI to find new space using a new University-wide space management system (25 Live), which revealed unused large classrooms and lecture halls that became available for departmental programs to use at no cost. The larger classrooms helped to greatly reduce waitlists. Successful workshop enrollment increased from 65% of all requests in 2014-2015 to 75% in 2015-2016. This translates to approximately 600 additional member enrollments. Workshop requests were converted from “wait list” to “registered” status, which greatly increased member satisfaction and confirmed the University’s commitment to our OLLI program.

Fiscal Year End Balances – All Accounts - as of June 30, 2016:

Operating Account: $207,531.25
Cultural Account: $12,851.46
George Goodman Fund: $6,042.01
Ruth Pasternack Fund: $1,971.65
Commemorative Account: $7,823.04
Endowment Earnings: $121,373.44
Fundraising Account: $22,961.93
OLLI Endowment market value: $1,191,525.60
Endowment interest earned: $62,273.40