Final Grant Report for the Osher Lifelong Learning Institute at Stony Brook University

Respectfully submitted on January 29, 2016 by: Dr. Charles Taber, Vice Provost for Graduate and Professional Education, Wayne Holo, Director of OLLI, Carolyn Jankowski, Assistant Dean, School of Professional Development, Diane Perillo, Assistant Director of Finance, School of Professional Development, Tara Stenzel-Fleming, Director of Foundation and Corporate Relations including endorsement from Mr. Dexter Bailey, Executive Director of the Stony Brook Foundation (SBF), and Dr. Samuel Stanley, President, Stony Brook University.

Itemized response to questions may be found below. Thank you for this opportunity.

1. Contact information of the person with primary responsibility for the Institute’s management:

   Dr. Charles Taber, Vice Provost of Graduate and Professional Education
   Room N203, Social and Behavioral Science Building
   Stony Brook University
   Stony Brook, NY 11794-4310
   E-mail: charles.taber@stonybrook.edu, Phone: 631-632-7049.

2. An updated description of the Osher Lifelong Learning Institute, that includes program structure, staffing, faculty and opportunities for volunteer engagement and leadership:

   OLLI at Stony Brook offers workshops according to the university’s academic term in fall and spring, with the majority of the workshops meeting for 11 weeks and a few workshops offered in a “mini workshop” format of 4-6 weeks. Each workshop is scheduled during the traditional college time vectors of 1 hours and 20 minutes and workshops can begin as early as 8:30 a.m. and run as late as 4:00 p.m. every day of the week. Special events and trips are held throughout the term and a June activities month is offered for 4 weeks, whereby workshop leaders can use the time to pilot an idea for a full workshop or do something less academic and more focused on a hobby or special interest.

   The program is administered by a full time Director, Assistant Director and a Member Relations staff position. A student assistant works in the office almost full time at twenty nine hours per week. Additional administrative support is provided by the School of Professional Development leadership and many are involved in university related support of the program. Some of the SPD staff have been assigned a percentage of their time to help administer the program, attending many of the key meetings necessary to support the activities and events and to help in overall decision-making (Board meetings, Budget meetings, etc.).

   OLLI at Stony Brook is highly dependent on a volunteer workforce as provided by the leadership of Board and Committee members, office volunteers and most importantly by the workshop leaders who lead over 100 workshops each term. These leaders give countless hours to the membership by offering interesting and stimulating lectures and hands on workshops on a variety of topics and specialized content. Each workshop is designed to satisfy the need for intellectual curiosity and social opportunities while supporting the lifelong learning mission goals of the membership.
3. A letter from the leadership of Stony Brook University detailing the University’s in-kind support for the program both now and going forward:

Attached please find letter(s) from Dr. Charles Taber, Vice Provost for Graduate and Professional Education at Stony Brook, who serves as the supervising administrator of the School of Professional Development and OLLI at Stony Brook, Samuel L. Stanley, MD, President of Stony Brook University, and Mr. Dexter A. Bailey, Executive Director of the Stony Brook Advancement Office (see attachments 01, 02 and 03).

4. One copy each of course catalogues, brochures and/or printed marketing material that have been created for the Institute since its last endowment report to the Foundation:

We are pleased to provide you with the following attached documents: (04) SP16 OLLI Course Catalog, (05) SP16 OLLI Workshop Schedule, (06) Staller Center Playbill Ad, (07) Lands’ End ‘Embroidered OLLI Logo, (08) OLLI Fold-Over Card (09) Member Handbook, (10) Workshop Leaders Guide, (11) Year End Holiday Letter.

5. The number of unduplicated, dues-paying members for the full member year; the number of the unduplicated, paying members for the current member year to date; and a description of the structure of the Institute’s membership offerings:

OLLI’s fall through spring member year runs from September through June. Members pay the full amount for 2015-16 whether joining in the fall or in the spring (no discounts).

Unduplicated dues-paying members for the full member year following fall 2015 registration totaled 1006 annual memberships. Spring 2016 registration added an additional 24 new annual memberships. Unduplicated, dues-paying members for current member year to date totals 1030 annual memberships. Registration continues through February.

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

6. A fiscal year budget for the Institute for FY15-16, including all income and expenses, and a financial report detailing the use of the $50,000 operating grant to date:

Attached please find the budget documents and the financial report of the $25,000 grant awarded as of January 29, 2016 (see attachments 12 and 13).
7. **A description of facilities where the program is administered and classes are presented:**

OLLI is fortunate to have a number of in-kind SPD-dedicated classrooms, computer labs and office space in the Ward Melville Social and Behavioral Sciences building for meetings, workshops, and small events. Classrooms on campus have become more available in kind with others made accessible to the program for a reasonable fee, especially if they require special equipment or setup. Off campus space has also been secured for a fee for a few workshops.

Examples of classroom space currently being used by OLLI are attached for your information (see attachment 14, “Classroom Examples”).

8. **Describe the Institute’s progress toward accomplishing the fundraising goals and activities set forth in its proposal and interim report:**

The “Give to OLLI” section on the website, implemented early last year on our website, was a key component to the success of our Calendar Year 2015 fundraising campaign. While some members still prefer to make their contributions by visiting our OLLI office, many of our members have found the new website portal to be a convenient way to make their donations from home.

Regular correspondence to the membership from the fundraising committee and president, facilitated by the OLLI office, kept the campaign visible to our members throughout the calendar year. Articles in OLLI’s monthly newsletter, *The Chronicles*, included a graphic representation of our fundraising goal thermometer. Emails and direct mail pieces were sent at regular intervals reminding members to give to OLLI. Additionally, announcements were made in workshops with the cooperation of our workshop leaders, reminding members to support their program with their gifts.

Commitment to the execution of these campaign components by our volunteers and staff, combined with the generosity of our members resulted in successfully achieving our CY2015 goal, as illustrated in the section below.

Please also provide the total amount raised in contributed revenue for 2015 to date, the total number of gifts received, the total number of unique donors, and gift amounts for the top three gifts:

<table>
<thead>
<tr>
<th>Calendar Year 2015 - All Donations</th>
<th>Calendar Year 2015 - Member Donations</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Total Amount Raised: $20,254.00</td>
<td>● Total Amount Raised: $15,984.00</td>
</tr>
<tr>
<td>● Total Number of Gifts Received: 226</td>
<td>● Total Number of Gifts Received: 209</td>
</tr>
<tr>
<td>● Total Number of Unique Donors: 188</td>
<td>● Total Number of Unique Donors: 173 (17% of members)</td>
</tr>
<tr>
<td>● Top 3 gifts: $3,000, $1,500, $1,500</td>
<td>● Top 3 gifts: $1,500, $1,500, $500 (3x)</td>
</tr>
</tbody>
</table>
Please also provide a detailed description of fundraising plans for calendar year 2016, including financial goals and a timeline for completing specific activities:

The 2015 fundraising plan was fully executed and helped us to successfully reach both membership giving goals and community-based sponsorship goals for the calendar year. With this success, the plan was renewed for 2016 with a number of additional campaign strategies.

We are pleased to share the “OLLI Fundraising Plan for Calendar Year 2016” (see attachment 15, “OLLI Fundraising Plan for Calendar Year 2016”). Some of the new campaign strategies added for 2016 which are included in the plan are:

- Refresh the content of the “Giving to OLLI” website section created last year. Continue to stress the value of “intrinsic” versus “extrinsic” motivation and rewards.
- Develop and implement a program of email and direct mail pieces designed specifically to encourage new member donor participants to participate by giving towards the growth and development of our program.
- Develop and implement a program that uses available donor history reports from University Advancement to create and send regular, monthly email reminders that encourage members who have given previously to renew their contribution.
- OLLI designed and created fold-over cards and envelopes with our logo which can be used as thank-you cards to member donors (see attachment 08, “OLLI Fold-Over Card”). Develop and implement a program using University Advancement reports and OLLI volunteers to send handwritten thank-you cards each month to donors along with a small, enclosed gift.

9. Please describe any other programmatic accomplishments or challenges since your last annual endowment report about which you would like the Foundation to be aware:

OLLI at Stony Brook is pleased to provide information about our programmatic accomplishments achieved since our last endowment report on August 31, 2015.

In response to requests of the membership to have a place to meet socially and to have opportunities to collaborate informally on academic interests and ideas, one of the smaller dedicated classrooms is currently being transformed into a new study and meeting space for the spring 2016 term. This pilot will be evaluated at the end of the term to see if members are making good use of this casual space and qualifies for a room remodel that will serve as a formal member study and meeting lounge. New tables and comfortable seating will be purchased and the room will be set up with the ability to serve light refreshments on occasion. This space will also serve as a pre-event location for activities being held on campus, such as plays, lectures, exhibits, sports events and musical performances in order to develop stronger relationships among the membership. It could also serve as a meeting space for intergenerational programs with members and students for conversational opportunities and studies. The space has been enthusiastically approved by the Advisory Board and will be implemented immediately.

To build upon the OLLI at SBU brand, members will have an opportunity to purchase products from Lands’ End, with OLLI at SBU logo embroidery (see attachment 07, “Lands’ End Embroidered OLLI Logo”). OLLI book bags are to be ordered and provided to all members as a way to promote
the program on and off campus. New tri-fold brochures and general business cards are being developed for use in fundraising campaigns and to offer to corporate sponsors when visiting with them and asking for support.

Collaboration with administrative departments on campus that support various Stony Brook University programs and events has been increased and will provide group activities for members and develop a stronger bond with their host university. These activities are important to create an atmosphere of pride and support beyond the link members have through the OLLI program. Such collaborations were made possible in fall 2015, when OLLI placed a full page ad in the Staller Center playbill for each of the productions open to the general public (see attachment 06, “Staller Center Playbill Ad”). The placing of this advertisement created opportunities for the Staller Center to work with OLLI to offer reserved seating for a few of their productions at a reduced rate and with a pre-show gathering. Another example was developed by members of the workshop entitled “The Business of Sports”. Members arranged for reserved seats at football and basketball home games with the Department of Athletics, which was well attended and continued throughout the season (see attachment 16, “SBU Special Events”). These events are expected to continue with a greater variety of offerings and gatherings that focus on bringing the membership together in new ways on campus (see attachment 17, “Arts and Sciences Invitation”).

Another improvement to operations became available to OLLI when, as Dr. Taber’s institutional support letter states, a new scheduling system called “25Live” was implemented on campus through the Registrar and became available for use by the OLLI scheduling staff. OLLI was given access to the system in order to preliminarily request space for classrooms should they become available once all credit courses were finalized for the term. After the University’s add/drop period passed, any unused classrooms were released for use by OLLI workshops with enhanced technologies and larger capacity (see attachment 14, “University Classroom Examples”). Because these classrooms were not being used for credit courses, no impact was felt by the University and space was more fully utilized. Over 1500 seats opened up to OLLI members as a result. From a workshop registration perspective, this new classroom opportunity allowed us to move over 500 wait-listed workshop registrations to registered status per week. The new technologies in these classrooms also ensured that audio-visual equipment was of the highest quality and in good working order. The AV staff on campus maintains all equipment at no cost to the OLLI program, since these rooms are university-supported. This also reduced the need to purchase equipment that was originally being planned for in the OLLI budget. A nice savings to the program was realized as a result.

During the recent summer and fall term, many efforts were made to address some of the challenges between the OLLI Board and the University, mostly related to the roles of each of the stakeholders and the need for stronger communications. “Best practice” examples of policies and procedures from other OLLI programs along with our current bylaws allowed us to create a new Policies and Procedures document which is patterned after those exemplary models. The new document clearly defines the parameters of the program, its relationship to Stony Brook University and the Stony Brook Foundation, and the roles and responsibilities of members and administration. It also identifies OLLI as a program of the university with an Advisory Board whose primary function is to support and represent members and provide advice to the administration. Article VIII of the Policies and Procedures document describes these advisory
responsibilities as well as the board’s mission and composition. The new Policies and Procedures
document replaces the bylaws under which our program previously operated and will take effect
in the Fall of 2016 (see attachment 18, “OLLI at Stony Brook Policies and Procedures”).

To add to Dr. Taber’s institutional support letter statements, communication between OLLI and
the Stony Brook Foundation has been improved through the Vice Provost for Graduate and
Professional Education who now provides oversight of the program and the Executive Director of
the Stony Brook Foundation (SBF) who oversees all fundraising and financial activities. The Vice
Provost has also made connections between the OLLI Director and School of Professional
Development staff on the one hand and SBF staff on the other, which now facilitates rapid
coordination. These staff now work together on administrative matters, strategic planning, and
reporting. A meeting on January 15th was held with the OLLI Advisory Board and SPD leadership
to discuss future plans and to build renewed trust. We are confident that relations between the
OLLI volunteers and administration are much improved and current members have become
willing partners. Dr. Taber has held informal breakfast meetings with the OLLI president to
reinforce this new spirit of cooperation.

Dr. Taber states, “We think it is important to stress that the vast majority of OLLI members are
only interested in the ways this wonderful program serves them, and this is our abiding interest
as well. We are confident that our improved collaborations and services will translate into higher
enrollments. In addition, our analysis of demographics in our region supports our own
experience of strong demand for our OLLI program. Long Island is home to a significant number
of retired and semi-retired adults seeking lifelong learning opportunities. There are very few
opportunities at other colleges on Long Island and they all serve demand from the western part
of the region (Hofstra’s PEIR program, Farmingdale State’s Institute for Lifelong Learning and
Molloy College’s Institute for Lifelong Learning program). Suffolk County and the east end of Long
Island, which is where Stony Brook University is located has a high population of eligible adults.
The United States 2010 Census for the areas surrounding Stony Brook, New York shows
significantly higher percentages of persons 65 years of age and over. Moreover, these data show
that the percentage of area residents who are 65 years of age or older and who are well-
educated is significantly higher than the US average. Based on our own survey data, our
membership is highly educated and their primary interests are academic, based on learning and
meeting new people.”

Our current capacity, given resources and staffing, is approximately 1050 members. We are
currently at 1030 as our spring term begins. We have plans for increased advertising and
publicity, but without additional resources and staffing to increase capacity, we are reluctant to
launch an outreach campaign. With an additional endowment to increase resources and staffing,
we would immediately pursue several options to increase capacity and launch our outreach
campaign.

Several recent opportunities have developed to collaborate with a Stony Brook education center
and local libraries that may increase classroom and event space as well as improve access. We
are exploring options to use our Stony Brook Southampton campus, located 50 miles east of
Main Campus, for satellite programs that would serve a completely new and currently unserved
community of retirees in the Hamptons. Should resources become available, an open
house/lecture event could be planned to increase awareness of our OLLI program in this area of
Long Island. Through these initiatives, the OLLI program at Stony Brook University can provide lifelong learning opportunities to a much wider audience than the membership it now serves within its current location.

We are very excited about the future of our OLLI program in service of our university mission. The progress we have made and the lessons we have learned in drafting a new Policies and Procedures document, addressing our relationships with the Stony Brook Foundation and our membership, and planning for growth and development has been extraordinarily valuable. This process has helped to greatly improve our Institute and the members it serves with potential to serve a wider community of lifelong learners in the future.