

2017–2018

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# ANNUAL REPORT

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OSHER LIFELONG LEARNING INSTITUTE  
AT AMERICAN UNIVERSITY

*Dedicated to the proposition that learning  
is a lifelong process  
and that curiosity never retires*



## OUR ACADEMIC PROGRAM

The heart of OLLI at AU is its academic program. Classes (study groups) are led by OLLI members, American University faculty, scholars from other institutions, and experts from Washington's think tanks and public policy organizations. Classes range in size from 110 in lecture halls to 10 in small discussion groups. Nearly 100 eight- to ten-week study groups were offered in each Fall and Spring



semester with an additional 43 shorter format classes offered in the intersessions.

All study group leaders are volunteers who generously give their expertise, time, and talent in support of lifelong learning. In addition to renowned scholars drawn

from the university community and organizations such as the Wilson Center and the Middle East Institute, the OLLI at AU faculty includes members who themselves have distinguished backgrounds. Whether an award-winning cancer researcher, a senior World Bank economist, a Plato scholar, or a former museum director, OLLI study group leaders bring a remarkable arsenal of professional success and intellectual firepower to their classrooms. Their equally diverse study group offerings range from *Great Moments in Physics* to *The Fall and Rise of Modern China* and from *Lorenzo the Magnificent* to James Joyce's "Dubliners."

The August 2016 move into the Spring Valley Building gave OLLI at AU year-round access to its classrooms. Last year, for the first time, classes were held in June, and this summer a July program was added to the academic calendar.

## LECTURES THAT INFORM AND INSPIRE

OLLI lectures feature leading figures in the arts, literature, public policy, and the sciences. During the 2017–2018 fiscal year, 27 lectures were offered free as a benefit to OLLI members. On a space-available basis they are also used as a recruitment tool and an opportunity for non-members to sample OLLI programming.

Lecturers during the past year included:



- Dr. Anthony Fauci, Director of the National Institute of Allergy and Infectious Disease;
- Deborah Rutter, President of the John F. Kennedy Center for the Performing Arts;
- Stuart Eizenstat, biographer of President Jimmy Carter;
- Alice Rivlin, founding director of the Congressional Budget office and chair of the “DC Control Board”;
- A’Lelia Bundles, great granddaughter and biographer of Madam C.J. Walker;
- Anthony Williams, former DC Mayor; and
- Azar Nafisi, author of *Reading Lolita in Tehran*.

## 2017–2018 FINANCIAL REPORT

In recent years OLLI at AU has transformed from a modest volunteer organization into a much larger, modern nonprofit with all the attendant requirements: more staff and benefits, technology, financial and legal advice, facilities, etc. The move into the Spring Valley Building came with moving costs, higher rent, and capital investments such as hearing loops. Expenses climbed while income did not keep pace, requiring us to dip into our reserve funds.



We began the 2017–2018 fiscal year with a budget deficit: member tuition was projected to cover less than 70 percent of total expenses of \$902,800. Earnings from two investment sources—an American University endowment established by the Bernard Osher

Foundation for the benefit of OLLI at AU and the Friends of OLLI Fund, an investment account owned by OLLI at AU—together were expected to cover another 15 percent of

## OLLI AT AU BY THE NUMBERS

**1373**  
MEMBERS



**147**  
RECORD #  
OF SGLs\*

**227**  
RECORD #  
OF CLASSES

**2474**  
RECORD # OF  
REGISTRANTS

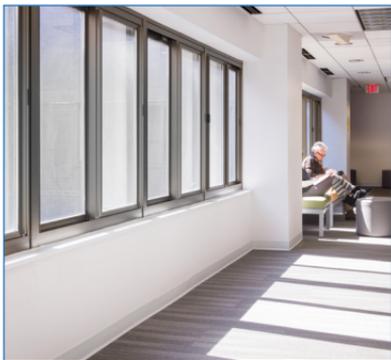
**99%** PERCENT OF OLLI AT AU MEMBERS WHO WERE VERY SATISFIED OR SOMEWHAT SATISFIED WITH OUR PROGRAMS IN THIS YEAR'S MEMBER SURVEY.

PERCENT OF OLLI AT AU MEMBERS WHO GAVE TO THE FRIENDS OF OLLI FUND (UNRESTRICTED) OR ONE OF OUR RESTRICTED FUNDS.

**27%**

**\$189,716** GENEROUSLY GIFTED AND PLEDGED BY OUR MEMBERS TO SUPPORT CORE PROGRAMS AND SPECIAL INITIATIVES.

\*Study Group Leaders



expenses. The funding gap was substantially filled by donations from generous OLLI members and friends.

The 2018–2019 budget reflects a far more sustainable model.

Expanding our academic year to include June and

July will raise revenue, while reducing outlays for capital investments will lower expenses, thus once again putting the OLLI at AU budget into balance as it has historically been prior to our recent move.

## **A CULTURE OF GIVING**

During the past year, OLLI at AU established an ongoing fundraising program. The effort, launched in June 2017, is designed to:

- Support core programs while keeping tuition affordable;
- Fund special initiatives; and
- Grow the Friends of OLLI Fund for future needs.

The response by OLLI at AU members and friends has been extraordinary with nearly \$174,000 given and pledged in 2017–2018. Their generosity now supports scholarships for OLLI members in need, professional enhancement for staff, new technology, and cultural and social programs. In addition to the unrestricted Friends of OLLI Fund, three new funds were established that also welcome additional support:

- The Alfred E. and Sylvia K. Brown Memorial Fund, honoring two founding members of OLLI at AU, sponsors special programs such as volunteer appreciation events and holiday parties.



- The Anne N. Wallace Fund, established in honor of our former Executive Director, supports development and training.
- Scholarship funds for members who need financial assistance were provided this year by the law firm of Zuckert, Scoutt & Rasenberger in honor of Raymond J. Rasenberger and the Posner-Wallace Foundation in memory of Lillian K. Posner-Wallace.



The Zuckert, Scoutt & Rasenberger gift provides for five years of funding.

### **LISTEN UP, LIFELONG LEARNERS!**

During the past year and funded by the Friends of OLLI Fund, hearing loops have been installed in all

OLLI classrooms. Considered the most effective assistive listening system, hearing loops significantly improve hearing for individuals with hearing loss, which afflicts one out of three people by age 65, OLLI’s core membership.

Now that all six of our smaller classrooms have been outfitted with loops, a similar installation in our large lecture hall on the lobby level is a fundraising goal in the coming year.

*“The hearing loop project is a major success for those of us with hearing difficulties.... It makes a huge difference.”*

— OLLI MEMBER

### **STRENGTHENING THE RELATIONSHIP WITH AMERICAN UNIVERSITY**

Establishing our new home in American University’s Spring Valley Building has helped strengthen OLLI ties to the university. During the past year, AU faculty members have generously given lectures, led study groups, and team-taught some of the most sought-after courses for OLLI lifelong learners.

In the Fall 2017 semester, AU's renowned School of Public Affairs offered a weekly class on Contemporary Issues in Law, Government, and Policy to packed OLLI lecture halls.

In the Spring 2018 semester, the highly regarded School of International Service attracted a similar following for its nine-week course on Foreign Policy Challenges of 2018.

For the first time this year, the American University Departments of Biology, Chemistry, and Physics assembled their faculty talent to present a series of classes addressing transformational topics in the sciences.



For its part, OLLI at AU this year established a highly successful collaboration with the university's International Accelerator program. The program helps international undergraduate and graduate students transition to the US university system and

bridges gaps in language, culture, and academics. In Spring 2018, a pilot program paired 14 international graduate students (shown above) with an OLLI member for English-language conversation and cultural exchange. Each pair developed its own relationship: meeting in coffee shops, sharing dinners in OLLI members' homes, celebrating family holidays, exploring Washington, DC, etc. The partnership received high marks from the university, students, and OLLI members and will expand in the coming year.

*“My partner was a great help with my academic, psychological, and emotional issues.”*

— AU STUDENT

*“There was an ease about our interactions that grew into a real friendship.”*

— OLLI PARTICIPANT

## LOOKING TO THE FUTURE

In the Fall of 2017, the OLLI at AU Board of Directors began work on a five-year strategic plan. The Board analyzed the long-term growth potential of its membership and programs and the impact of that growth on space and financial stability. Guiding the effort was a commitment to an ambitious academic program and a vibrant intellectual community for lifelong learners that is affordable and financially sustainable.

In a competitive process, OLLI at AU was selected by Compass, a strategic consulting service that provides pro bono management advice to nonprofit clients in the Washington, DC

### OLLI AT AU STRATEGIC GOALS

- **Providing for future membership and program growth** by extending our academic calendar and maximizing use of our classroom space in the Spring Valley Building;
- **Strengthening and refreshing the academic program** with an expanded faculty and curriculum;
- **Strengthening ties with American University** based on the shared values of academic excellence, community engagement, and organizational strength;
- **Ensuring long-term financial stability** that keeps pace with a growing membership, supports academic excellence, and protects the Friends of OLLI Fund for future needs;
- **Expanding the racial, ethnic, and socio-economic diversity** of OLLI at AU; and
- **Establishing a culture of giving** that supports core programs while keeping tuition affordable, funds special initiatives, and grows the Friends of OLLI Fund for future needs.



area. During their eight-month engagement, nine Compass consultants (some shown at left) provided program and financial analysis, as well as best practices culled from comparable OLLIs across the country. In addition, members and

study group leaders had an opportunity to express their views on the future direction of OLLI at AU through an extensive survey as well as three focus groups conducted in April 2018.



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Thank you for considering a gift to the Osher Lifelong Learning Institute (OLLI) at American University. To assist you in choosing the most beneficial way for you to support OLLI, the following information is provided.

### **Donations can be designated to one of these specific funds:**

- Friends of OLLI Fund, an unrestricted fund,
- Alfred E. and Sylvia K. Brown Memorial Fund to sponsor OLLI at AU special programs,
- Raymond J. Rasenberger Fund for scholarships, or
- Anne N. Wallace Fund to support staff development and training.

### **A gift to OLLI can be made with:**

- An outright gift,
- A pledge, payable annually over three years,
- A designation as a beneficiary of your IRA, retirement plan, life insurance, or bank/brokerage account, which is tax-free,
- A gift from your donor-advised fund, such as a Fidelity Charitable, a Vanguard Charitable, or a Washington Community Foundation fund, or
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