

#112

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Page 2: Institute Name & Time Period

Q1 **George Mason University**

Osher Lifelong Learning Institute at:

Q2
Time period for this report (e.g. July 1, 2019 – June 30, 2020)
January 1, 2020 - December 31, 2020

Page 3: Paying members, fees, and membership year

Q3
The total number of unduplicated, dues-paying members for the reporting period
1046 annual + 23 introductory 1059

Q4
A description of the Institute's fee structure, including membership fee(s) and fees for courses and activities that are not included with membership
450/year; 150/introductory term; 300/promotional first year

Q5
How does the Institute define its membership year?
All inclusive

Q6 **Decreased**
Has the number of dues-paying members increased, decreased, or stayed the same since the Institute's last Annual Endowment Report?

Q7

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

COVID-19

Q8

No

Does the Institute also provide services to individuals who are not counted in the dues-paying membership total provided above? For example, individuals who receive complimentary memberships; attend lectures that are open to the public; pay more to take classes as non-members; or participate through fee-for-service agreements with their retirement communities.

Q9

Respondent skipped this question

If yes, what is the estimated total number of non-dues-paying individuals who participated in the Institute's programs or services during the reporting period? (Please provide your best estimate.)

Q10

Respondent skipped this question

If yes, please provide a brief description of how individuals who are not dues-paying members participated in or received services.

Page 4: Staffing and volunteers

Q11

No

During the reporting period, have there been changes in personnel, furloughs, or adjustments to the staffing structure of the Institute?

Q12

How many full-time staff(more than 30 hours per week), part-time staff(less than 30 hours per week), and Work Study Students does the Institute employ?

	Full-time Staff	Part-time Staff	Work Study Students
Staff Number	2	10	

Q13

No

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?

Q14

Approximately how many volunteers (including all volunteer roles) assisted the Institute during the reporting period?

400

Page 5: Location of classes

Q15

3

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

Q16

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

Fairfax, Reston, Sterling

Q17

Yes,

Have there been changes to the locations where the program is administered or where courses are offered during the reporting period?

If you selected 'Yes' please describe::

All Classes are virtual since Spring of 2020

Q18

No

Are any changes needed for the Find an Osher Institute Near You map on the NRC website?

Page 6: Constructive developments and greatest challenges

Q19

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

With the implementation of Zoom technology, OLLI Mason members have enjoyed continuing participation on our program, social engagement and volunteer opportunities during the pandemic.

Q20

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

The greatest challenge in 2020 was our response to the Covid-19 pandemic. The institute pivoted all course offerings, social events and operational meetings to a virtual space. We increased staffing hours to support a much more labor-intensive product delivery—increasing expenses. Additionally, membership dipped and we lost income. In response, we instituted a promotional rate, conducted a massive outreach campaign and applied for a PPP loan from the government. The CARES funds and the promotional campaign have bolstered us, for now, but we project huge losses in 2021.

Page 7: Fundraising

Q21

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

Direct-mail solicitation letters,

Membership renewal forms included opportunity to contribute

,

Identified/cultivated/solicited major-donor prospects,

Promoted planned giving/legacy gift opportunities,

Website provided opportunity for online giving,

Solicited sponsorships/support from corporations

Q22

The 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.) Answer must be a whole number with no \$, commas, etc.

46900

Q23

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

no

Q24

What percent of the Institute's members contribute to the annual fundraising campaign of the Institute?

14

Page 8: Questions about your Institute's endowment

Q25

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

Market Value: **1943728.52**
As of mm/dd/yy: **November 30, 2020**

Q26

The market value of the Osher Lifelong Learning Endowment as of the beginning of the host institution's 2019-20 fiscal year:

1843311.80

Q27

The market value of the Osher Lifelong Learning Endowment as of the beginning of the host institution's 2020-21 fiscal year:

1758920.98

Q28

The total amount that has been distributed from the Osher Lifelong Learning Endowment for the 2019-20 fiscal year:

92165.59

Q29

The total amount that either has been or will be distributed from the Osher Lifelong Learning Endowment for the 2020-21 fiscal year:

87946.05

Q30

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

Q31

Yes, print and mail

Does the Institute print and mail course catalogs/brochures?

Q32

Contact information for the program director or person with primary responsibility for the Institute's operations:

Name: **Jennifer Disano**
Address: **4210 ROBERTS RD**
City/Town: **FAIRFAX**
State: **VA**
ZIP: **22032-1028**
Email Address: **jdisano@gmu.edu**
Phone Number: **7035033384**

Q33

Contact information for the dean or academic administrator who oversees the division that administers the Institute:

Name: **Mark Ginsberg**
Job Title: **Provost**
Address: **4400 University Drive**
City/Town: **Fairfax**
State: **VA**
ZIP: **22032**
Email Address: **mginsber@gmu.edu**

Q34

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**

Q35

Respondent skipped this question

Contact information for other employees/staff at your Osher Institute to receive communications from the National Resource Center:

Q36

Respondent skipped this question

Contact information for other employees/staff at your Osher Institute to receive communications from the National Resource Center:
