

History of the Osher Foundation Relationship with Yavapai College

Rita Wuehrmann, administrator for the Prescott OLLI, came across an announcement for the Osher Foundation grants, and brought the information to Dennis Garvey. Dennis Garvey, Dean for the Division of Lifelong Learning, had also seen the announcement, and he opened communication with the Osher Foundation with the hope of pursuing funding. Applications to the Osher Foundation were by invitation only, and initially the Foundation expressed concern about the ability of a Community College to handle the potential endowment award. After many months, the Osher Foundation was sufficiently impressed with Yavapai College and the Yavapai Learning Institute and Elderhostel programs to invite our college to apply for a grant.

The initial proposal, authored by Dennis Garvey with the assistance of Rita Wuehrmann and Carol Bollinger, Yavapai College grant writer, was submitted in the fall of 2003, for a \$100,000 grant. This grant was renewable for 2 additional years (for a total of 3 years), with the potential of an endowment gift of “no less than \$1 million should the institute demonstrate potential for success and sustainability.”

(<http://www.osherfoundation.org/index.php?olli>). A stipulation of the original \$100,000 grant award was: “please note that the designation of each Osher-funded program as an ‘Osher Lifelong Learning Institute’ is a condition of the Foundation’s grant making, as is the use of a logo that consists of a simple circle with the words ‘Osher Lifelong Learning Institute’ arranged within.” (Request for Proposals (RFP): Osher Lifelong Learning Institutes September 2003)

At the time of the initial proposal from Yavapai College (November 3, 2003), YLI on the Prescott Campus had approximately 400 members. The Academy for Lifelong Learning in Sedona was just being established in the fall of 2003. The goals for this grant included the expansion of the programs in Sedona and the Verde Valley, increasing the participants within YLI, upgrading technology, and a survey of community needs. In quantitative terms, the goals were for YLI to grow by 15%, the Academy for Lifelong Learning to grow by 20%, and Elderhostel to grow by 5%.

The second year application was submitted in February of 2005. Enrollment trends were recorded as follows:

	2003/2004	2004/2005	2005/2006 Projected
Prescott	346	423	520
Sedona	26	82	150
Clarkdale		20	45

The third year application was submitted in May of 2006. The cover letter of this application reported an active membership of 700 and an unduplicated head count of 1072 across all three campuses.

	2003/2004	2004/2005	2005/2006	2006/2007 projected	Total unduplicated Headcount
Prescott	346	423	492	575	601
Sedona/Verde	26	102	208	300	471*
Totals	382	525	700	875	1072*

*includes special seminars in Sedona

Yavapai College was invited to apply for the \$1 million dollar endowment in September of 2006. The Osher Foundation requested the following information: a statement of University support, volunteer leadership, number of courses, number of unduplicated dues-paying members, other sources of support, management of the endowment, and any other comments. Nowhere in the application does it specifically state a target membership number.

One of the strengths of working with the Osher Foundation is that they aren't driven by hard numbers – they look at the entire picture of a lifelong institute when considering an application for grants, and endowment. In reviewing all the material we have on the Foundation, it appears that the basic criteria for invitation to apply for the endowment shifted over the years. In 2005, an email reflects that initially, the Foundation would consider institutes with at least 300 members for an endowment. They then raised the goal to 500 in 2005. Sometime between that email in 2005, and 2008, that goal was raised to 1,000 members for the initial \$1 million dollar endowment. It is unclear what the expectation was in September of 2006, when the Yavapai College OLLI submitted the application for the first endowment. However, YC OLLI did report 1,072 unduplicated members in May of 2006.

In January of 2007 the Osher Foundation awarded Yavapai College a \$50,000 “bridge grant” to assist in the transition of funding from the annual grants to the endowment. This was awarded as the endowment would not have had any time to collect interest at this point, and so there would be no interest to draw on for funding.

The annual report submitted in August of 2008 reflects the following unduplicated head counts:

2005-2006	1072	
2006-2007	1129	5.31% growth
2007-2008	1379	22.14% growth

The August 2008 annual report submitted to the Osher Foundation served as the “application” for the second million dollar endowment. In October of 2008 the Osher Foundation awarded YC OLLI a second \$1 million dollar endowment based on “the continued progress of the program and the significant number of members it now serves.” (Letter from David Blazeovich dated 10/22/2008.) In addition, the foundation gifted Yavapai College with a \$25,000 grant in November of 2009, reflecting the difficulty of the economic downturn in the economy and its impact on endowment interest rates.