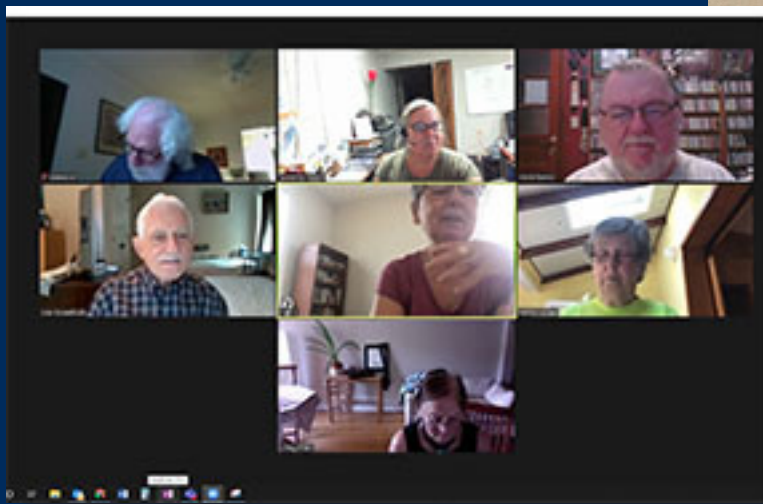




West Virginia University®  
OSHER LIFELONG LEARNING INSTITUTE



# 2019-20 Annual Report



*Our mission is to promote connection, curiosity, exploration, discovery, and discussion through learning and social engagement in non-credit classes, lectures, field trips, and events designed for adults 50+.*

# OLLI @ WVU 2019-20 Annual Report

The OLLI Annual Report for fiscal year 2020 provides an overview of the activities, accomplishments, and assets of the program between July 1, 2019, and June 30, 2020.

This year started strong for OLLI at WVU. With the help of our leadership, volunteers, members, donors, benefactors, and friends, OLLI at WVU continued to offer more classes and opportunities to more older adults in the Morgantown and Charleston areas.

While membership in the Charleston area was growing steadily, membership in Morgantown began to fall. Feedback suggested that the increasing frequency and length of wait lists for classes was discouraging membership renewals. This is a situation that we need to continue to monitor.

Among the significant events of 2019-20 were the following:

- OLLI hosted Steve Thaxton, Executive Director of the National Resource Center (NRC) for Osher Lifelong Learning Institutes, as our Irving Goodman Aging Lecture speaker in September.
- In October, I was invited to attend a symposium hosted by the NRC in Chicago. The three-event event featured presentations and group discussions on fundraising, membership marketing and retention, working with volunteers, diversifying revenue sources, and facilities management, as well as opportunities to network with a small group of fellow OLLI directors, NRC staff, and Osher Foundation staff.
- The facilities committee began the process of securing additional classroom space at the Mountaineer Mall. The committee met with representatives of WVU Facilities Planning to discuss OLLI's space needs and tour several locations. A special meeting was held in early March to discuss plans, space needs, and fundraising options with OLLI's members in Morgantown.
- In March, OLLI was granted a third Osher Capacity Building grant in the amount of \$25,000 to fund a part-time staff person in Charleston for the next fiscal year.

Unfortunately, near the end of our winter term, our world was turned upside down by COVID-19, a world-wide pandemic. WVU sent employees and students home and transitioned to remote classes and work. OLLI's response to this new environment and its impact are detailed in a separate report on the back page.

Despite the uncertainty surrounding the closing of this year, and the beginning of 2020-21, I remain confident that OLLI at WVU will land stronger on the other side of this crisis.

Thank you for your continued support.

Jascenna Haislet  
Director, OLLI at WVU

## OLLI Board of Directors (2019-2020)

Ed Johnson, President  
Beverly Kerr, Vice President  
Clark McKee, Secretary  
George Trapp, Treasurer  
Sarah Woodrum, SPH Rep.  
Carolyn Atkinson  
Hilary Attfield  
Lynn Baker  
Gwen Gill  
Kay Goodwin  
Kathy Hanko  
Linda Jacknowitz  
Sonja Jewel Kelley  
Jane Martin  
Florita Montgomery  
Gwen Rosenbluth

## OLLI Board of Advisors

Bob Craig  
Roger Dalton  
Ann Davidson  
James Dylan Held  
E. Jane Martin  
Betty Maxwell

## OLLI Committees

Curriculum	Chair: Carolyn Nelson
Facilities/Technology	Chair: Vacant
Finance	Chair: George Trapp
Fundraising	Chair: Vacant
Marketing	Chair: Ed Johnson
Membership	Chair: Gwen Gill
Nominating	Chair: Kathy Hanko
Irving Goodman Annual Aging Lecture Series (IGALS)	Chair: E. Jane Martin

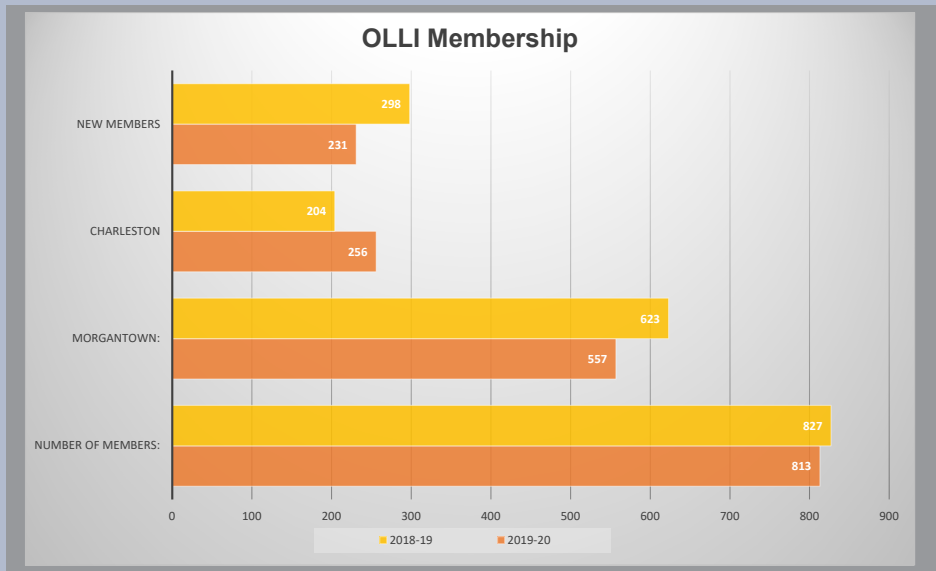
## Staff

Jascenna Haislet, Director  
Michelle Klishis, Professional Technologist  
Diane Cale, Program Assistant

# Membership, Volunteers, & Activity

## 813 Members

2% ↘



Over  
**850\***  
non-members  
served

\* includes non-members on the Friday ebulletin list who receive on a weekly basis general information of interest to older adults, and about events at OLLI, WVU, and around the community.

**196** classes, lectures, interest groups and workshops

**12** special events

**5** regional day trips

**5,983** registrations

**209** volunteers,

**128** including  
instructors

**21** scholarships

**13** for  
recipients

# Sponsors & Partners

OLLI at WVU continues to grow as an organization with the unwavering commitment and generosity of our patrons and supporters. We acknowledge and thank the following:

- The Bean Counter
- The Bernard Osher Foundation
- B'nai Jacob Synagogue
- Collette Travel
- Edgewood Summit
- George D. Hott Memorial Foundation
- Harmony at Morgantown
- John Mathew Gay Brown Family Foundation
- Kroger Company
- Mountaineer Mall
- Morgantown Art Association Gallery
- Morgantown Dance Studio
- Robert C. Byrd Courthouse
- Schoenbaum Family Education Center
- South Charleston Public Library
- Spruce Street United Methodist Church
- Temple Israel
- The Village at Heritage Point
- West Virginia University, President's Office
- WVU Foundation
- WVU School of Public Health (SPH)

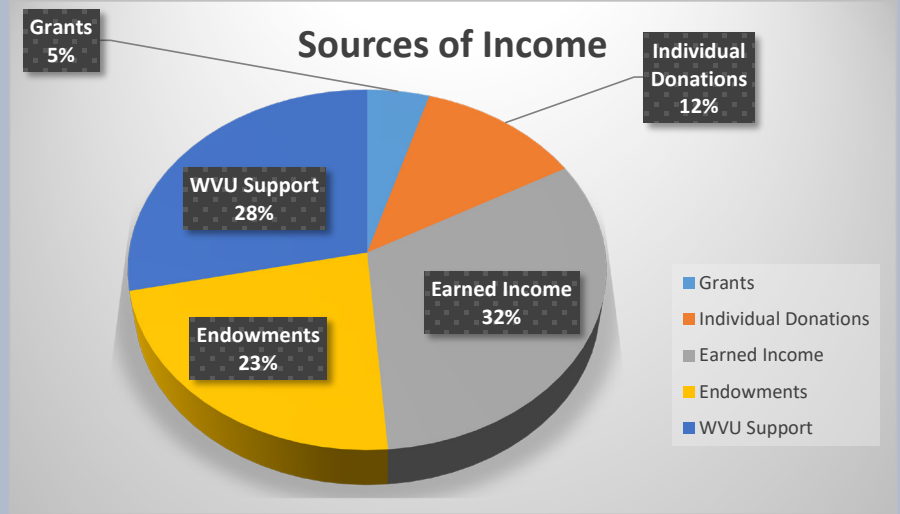
## The Bernard Osher Foundation

The Bernard Osher Foundation seeks to improve quality of life through the support of lifelong learning institutes such as OLLI at WVU. The Foundation was founded in 1977 by Bernard Osher, a respected businessman and community leader. The Foundation has now funded 124 Osher Lifelong Learning Institutes on campuses of colleges and universities from Maine to Hawaii. Funding for OLLI is contingent upon membership growth goals, so **membership matters**. To learn more about The Bernard Osher Foundation, please visit their website at [www.osherfoundation.org](http://www.osherfoundation.org).

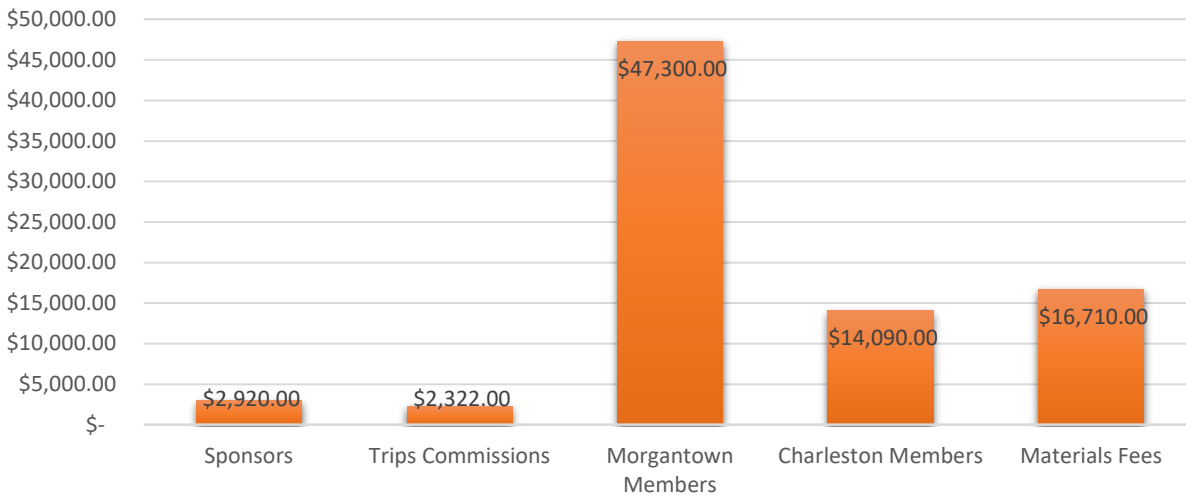
# Income & Expenses

## Income

Grants:	\$12,000
Individual Donations:	\$31,791
Earned Income:	\$83,342
Endowments:	\$59,702
WVU Support:	\$74,033

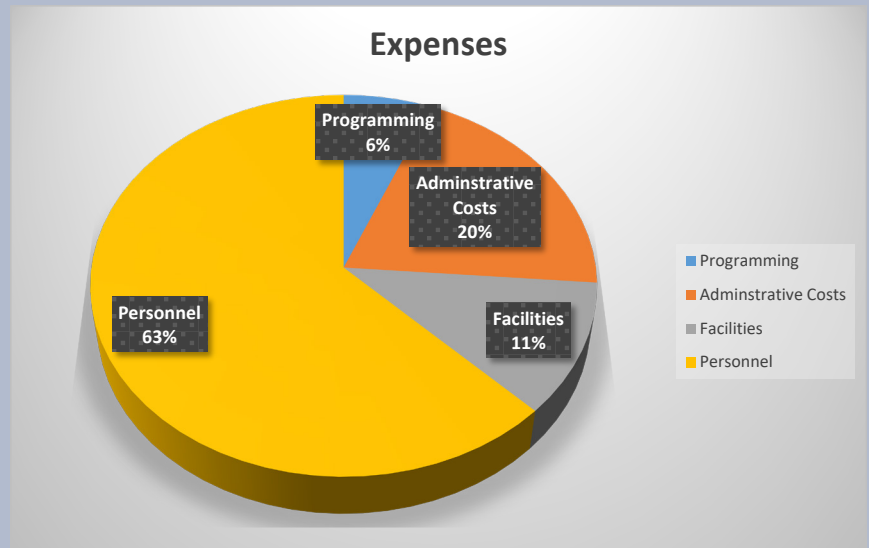


## Sources of Earned Income



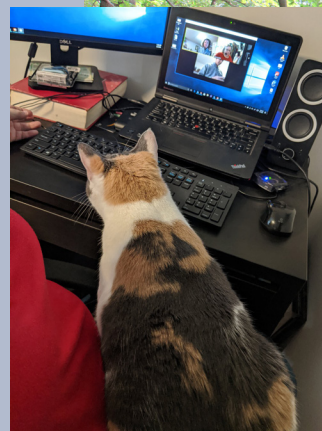
## Expenses

Programming:	\$ 14,977
Administrative Costs:	\$ 48,337
Facilities:	\$ 27,064
Personnel & Fringe Benefits:	\$150,726



# A Year in Photos

## Classes, Trips, & Events



# Thank You to Our 2019-20 Donors

Robert & Auri Acciavatti  
John C. & Joyce Allen  
Gerri B. Angoli  
Anonymous  
Stephen & Susan Arnold  
Michael & Hilary Attfield  
Nancy Atwell  
Charles & Sarah Badger  
Betty M. Bailey  
Judy & Robert Bailey  
Lynn & Maurice Baker  
Geoff Ballard  
Diana R. Beam  
Lee Ann Beaumont  
Evelyn Bennett  
Saul R. & Rhonda C. Berg  
Renee Bergner  
Susan Bordonada  
Mary Boroff  
Joyce Bower  
Carole Boyd  
Mary Boyd  
Judith Bradford  
Mary Ellen Brady  
Nancy Brallier  
James Brannon  
Barbara H. Brown  
Dr. & Mrs. William E. Bucy  
Cathy Butcher  
James Callner  
Marilyn Casdorff  
Marlies Charbonniez  
Nyles Charon & Anne Selinger  
Stan & Judy Cohen  
Kenton & Madeline Colvin  
JoAnne Cook  
Sylvia Cooper  
Thomas & Hope Covey  
Bob & Margaret Craig  
Kelly Curry  
Roger & Charlotte Dalton\*  
Nancy Daugherty  
Brad Daugherty  
Ann Davis & Lloyd Davidson  
Ruby De La Mata  
Janice Denison  
Nancy L. Diener  
Judy Dinsmore  
Sue Dragovich  
Jane E. Duffy  
Helen Epps  
Joann J. Evans  
Christine & John Fazio  
Martha & Robert Ferrell  
Christine Ferrell

Mary & John Fischer  
Marsha Fletcher  
Michael Fotta  
Michalene Fox  
Ruth Gardner  
George D. Hott Foundation  
Shirley Giuliani  
David Gross  
Denise Gwinn\*  
Priscilla M Haden  
Jascenna Haislet\*  
Rose Haislet\*  
Judith Hall  
Catherine Hamilton  
Janet Hamilton  
Joe Hample & Barry Wendell  
Paul & Kathy Hanko  
Mark Harrison  
Katherine S. Hastings  
Jim Held & Bonnie Brown\*  
Richard Hess  
Elissa Hoffman  
Sara Jane Hornbeck  
Barb Howe  
Jerrey Hoyt  
Linda Jackowitz  
Willa Jarvis  
Pat Jenkins  
Maureen Johnson  
Ed Johnson\*  
John Mathew Gay Brown Family Foundation  
Patricia C. Johnston & Lawrence Frail\*  
Kathryn Kay  
Sue Keller  
Michael & Royce Keller  
Sonja & Chris Kelley  
Emory & Janet Kemp  
Yvonne Khourie  
Doug Kilmer & Janis Reynolds  
Steve & Susan Kite  
Sandra Knowles  
Kroger Company  
Sherrilyn Kuehn  
Walter & Kathleen Labys  
Roy B. Leonard  
Ronald & Susan Lewis  
Nancy & Roger Lohman  
Karen S. Long\*  
John & Harriet Loth  
Sally & Charles Love  
Jamee N. Luna  
Jane E. Martin  
Betty Maxwell  
Stephen & Connie McCluskey  
Kim & Dave McCluskey  
Bill McCutcheon

Clark & Allyson McKee\*  
Trina S. Means  
Earl & Cecelia Melby  
Robert & Miriam Miller  
Lawrence Miller  
Florita Montgomery  
Dorothy Moore  
Judy & Andy Morris\*  
Donald & Mary Morrison  
Prasadarao B. Mukkamala  
Lisa A. Murdock  
Colleen & Phillip Murray  
Charlotte Nath  
Carolyn & Byron Nelson  
Elizabeth Nelson  
Cindy O'Brien  
Judith Osha  
Penny Patton  
Joe Paul & Eleanor Grubbs Paul  
Howard & Beverly Persinger, Jr.  
John & Mary Pigza  
Cecil Pollard  
Nancy & John Raley  
Richard Reardon\*  
Peg Reese  
Richard Robb  
Frank & Madelyn Romeo  
Shirley Rosebaum  
Alan & Gwen Rosenbluth  
Larry Rowe  
Steve Runfola  
Barbara J. Schell  
Diana F. Scott\*  
Diana Scott-Beattie  
Len & Eleanor Simmons  
Judy Sirk  
Sharon Smith  
Sandy Smith  
Gloria Sofranko  
Eleanor Spohr  
Pat Stanton  
Nancy Stark  
Annette Tanner  
Rita Tanner\*  
George & Viera Trapp\*  
Becky Turton  
Wally & Norma Venable  
Lynn Vespoint  
William & Susan Vieweg  
Bill Weiss\*  
Judy Werner  
Stephen Wetmore  
Grace & Gary Wigal  
Lex & Jill Woisnet  
Jani Wright  
David Yelton  
Linda Yoder

*\*Sustaining Donors*

**\$31,841.26** from  
**194** OLLI members and **22** friends

# COVID-19 Response

In response to the world-wide COVID-19 pandemic, OLLI's board of directors voted on March 13 to cancel remaining winter term classes and delay the beginning of in-person spring 2020 classes until May 4. By March 16, WVU was encouraging employees to work from home. By March 21, the Mountaineer Mall, where the OLLI office and classrooms are located in Morgantown, was closed until further notice per order of the Governor of West Virginia.

OLLI cancelled all in-person classes and transitioned to online learning for the spring term with 22 classes converting to a Zoom platform. Several Zoom training sessions were added to the schedule and Ask-a-Geek was expanded to a weekly schedule. To engage members in a social setting, a weekly Sunday evening happy hour was created.

Registration for spring term classes began on the morning of March 16, prior to WVU's work-from-home announcement, with hopes that we would be back together by early May. Over the next three days, we processed \$2,935 in memberships and spring term enrollment fees. By Monday, March 23, it became clear the OLLI would not be holding face-to-face classes during the spring term and registration was paused.

As we encouraged instructors to offer classes online, I made the decision to offer any available OLLI programming during the spring term free and open to the public. This decision was based on the desire to support and serve older adults in our wider communities under stay-at-home orders and the uncertainty of not knowing what the quantity or quality of programming we would be able to offer was going to be at the time.

Members who had already paid their spring term enrollment fees and/or had purchased their membership within the preceding two weeks were offered a refund, a credit for an upcoming term, or the opportunity to donate their payment. Seventy-one

members donated a total of \$2,070 of membership dues, enrollment fees, and field trip payments to OLLI.

In a further effort to keep our members informed and engaged, board members made two rounds of phone calls to members to check-in and answer questions.

The frequency of OLLI's ebulletin increased to twice a week through the spring term and staff researched other online opportunities for our members to enjoy.

OLLI granted 16 complimentary memberships for the spring term. At least 173 individual OLLI members participated in OLLI classes via Zoom between April 1 and June 30.

Despite falling short of our membership/enrollment fee income goal of \$68,000, our goal for individual donations was exceeded by \$13,791. OLLI finished 2019-20 with a budget surplus of \$15,952.

A couple of positive things have come out of OLLI's forced transition to online programming. One is our ability to now offer online programming for older adults in our communities who are not able, even in non-pandemic times, to join us in our physical classroom spaces due to health and/or transportation issues. Online programming has been on our list of future plans for a few years. Now we know that we can offer these opportunities and will move forward with plans to incorporate online options in future terms.

The other positive is that online programming has enabled and encouraged exchange between our Morgantown and Charleston programs. Most classes, regardless of the location of the instructor, were offered to members from both locations at the same time. We witnessed several reunions online of old friends and acquaintances.

In April, the board voted to start the 2020-21 membership year online only.

Jascenna Haislet  
Director, OLLI at WVU



West Virginia University®

OSHER LIFELONG LEARNING INSTITUTE



2019-2 Annual Report

10.08.2020

Prepared by Jascenna Haislet