

# The OLLI Times

OSHER LIFELONG LEARNING INSTITUTE at the University of Georgia Newsletter

FUND DEVELOPMENT



SPECIAL EDITION

December, 2012

## Opportunity to Leave a Lasting Impact

### President's Note

In this season of great change, we are delighted to inform you of some of the exciting new developments being put into place to ensure that current and future members of OLLI@UGA continue to enjoy the high quality courses and activities that we have all come to expect.

As previously noted, the Development Committee became the Fund Development Committee and the Marketing Committee became the Marketing Development Committee at a 2012 Board meeting. A Steering Committee was also established to create a Statement of Purpose which will guide the Fund Development Committee in its work to assist OLLI@UGA in achieving greater financial stability. That Statement can be found on the back page of this special edition.

With a makeup of OLLI@UGA officers, committee chairs, staff, members and a UGA College of Education representative, the Steering Committee discussed programs that could be developed to best provide immediate as well as subsequent operating funds to support the annual budgets. These funds would be used as an additional revenue source along with membership dues and class fees to keep our curriculum and established activities affordable for all our members.

After much thoughtful discussion, the Steering Committee felt the best means to accomplish these ends would be to establish an annual fund as well as special events organized to support its growth. Our desire to keep the high quality programs we offer our membership affordable and sustainable can be met by using the funds raised from this effort. Success of this program will benefit the entire membership, and allow us to uphold the standards we have set for this organization that means so much to so many.

We have gotten off to a good start with the Leave a Legacy planned giving program, which is designed to help OLLI@UGA sustain itself for generations to come. Monies from that program will be put into the UGA Foundation and into a portfolio from which interest earned comes back to OLLI@UGA on an annual basis. The Fund Development Committee will continue its work with the membership and the UGA Foundation while also overseeing the newly created Annual Fund.

We thank The OLLI Times editor, Pat McAlexander, for giving us this special edition to provide our membership with detailed information of this newly formed fund. The fund will give us the ability not only to sustain but to grow



our programs and increase our outreach on an annual basis. It will help augment the programs we are able to provide. There is a way for each and every member of OLLI@UGA to participate as a donor or a volunteer, and we look forward to continuing our long standing tradition of working together for the benefit of all our members.

On behalf of the board of directors, I would like to thank the Fund Development Steering Committee for their very thoughtful work. And, as always, I want to thank the very active membership of OLLI@UGA for the support you give to guarantee our lasting success.

*Bill Alworth*  
President, OLLI@UGA

# Leave a Legacy - OLLI@UGA

Offering our members the opportunity to support OLLI@UGA without interruption to their current financial situation, the Leave a Legacy campaign is a planned giving program designed to provide a variety of endowment options. Traditionally, planned giving is done through an estate, but there is a wide array of possibilities to suit your specific financial goals.

The portfolio of Leave a Legacy for OLLI@UGA is managed by the UGA Foundation, and all funds will go to sustaining our organization for generations to come. All decisions regarding the withdrawal and spending of the funds rest solely with the OLLI@UGA Board of Directors.

Many donors are pleased to become aware that they have the ability to designate how their funds will be used. A confidential consultation with UGA's Planned Giving Specialist and OLLI@UGA member Melinda Thomas (thomasme@uga.edu 706 542-8869) or committee member and UGA's Executive Director of College Advancement Aldon Knight (aknight@uga.edu 706 542-2267) can be set up to learn how best to become part of the Leave a Legacy Planned Giving Campaign.

We have set an ambitious goal of obtaining thirty gifts in three years. Please ask yourself whether this campaign can be right for you.



## Special Events



It is going to be a busy season for the OLLI@UGA Fund Development Committee. In order to ensure the success of both the Annual Fund and the Leave a Legacy campaign, several events will be planned to showcase these important programs.

Functions for the greater Athens community, as well as exclusive membership occasions, will take place throughout the year. There will be a host of volunteer opportunities for OLLI@UGA members to take part in making these programs a success.

*Stay tuned to the OLLI Times for details on these exciting upcoming events.*



### **OLLI Times Schedule Changed!**

**Stories Now Due January 28th. The next issue will be mailed out the week of February 13th.**

# Annual Campaign Fund

*“We make a living by what we get, we make a life by what we give”*

*-Sir Winston Churchill*

The financial mainstay of almost every successful not-for-profit organization, an annual fund allows an organization the fiscal security it needs to carry out its mission. As OLLI@UGA approaches a 1,000 member threshold, the board of directors agreed that the time had come to begin such a fund for our beloved organization.

Two primary objectives were identified that could be achieved through the establishment of a well conceived annual fund. The first is to keep our high quality programs affordable. The costs for paper, printing, staff and space continue to rise. The money raised from this fund will be used

to mitigate those expenses, without there having to be interruptions in lifelong learning programs.

The second objective that can be achieved through our annual fund is strengthening our relationship with the Osher Lifelong Learning Institute. OLLI@UGA is one of 117 institutes around the country established by the Bernard Osher Foundation. The demonstration of sound fiscal management would make a second endowment (as well as another grant) attainable.

As the saying goes “timing is everything,” and creating this annual fund at this crucial time will enable OLLI@UGA to continue its



growth without jeopardizing the high standards that our membership deserves.

This campaign takes into account the unique situations of all OLLI@UGA members and provides opportunities for each individual to contribute at any financial level that is comfortable or participate in volunteer activities that support this fund. The Fund Development Committee is committed to running the campaign in an efficient and cost effective manner.



*“I went into the woods because I wished to live deliberately, to front only the essential facts of life, and see if I could not learn what it had to teach and not when I came to die, discover that I had not lived.”*

*-Henry David Thoreau*





# Fund Development Committee

## Statement of Purpose

The Fund Development Committee, an outgrowth of the previous Development Committee, was established by the Board of Directors.

The purpose of the Fund Development Committee is to raise extraordinary funds to provide and sustain quality learning opportunities for OLLI@UGA members and to serve as an asset to the greater community; to maintain a level of program affordability for our members' continued participation in an active way; and to continue to strengthen our relationship with the University of Georgia and the Bernard Osher Foundation.

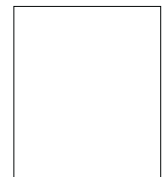


The Fund Development Committee will engage the OLLI@UGA membership as both donors and volunteers to support the goals and objectives as set forth in a yearly fund development proposal.

The Fund Development Committee reports to the Olli@UGA Board of Directors and by extension the membership.



850 College Station Road  
Athens, Georgia 30602



## Fund Development Special Edition!

Look inside to see what we're  
doing to make OLLI@UGA  
even better!