

OSHER LIFELONG LEARNING INSTITUTES: A PROGRAM OF THE BERNARD OSHER FOUNDATION

Background

The Bernard Osher Foundation is a charitable foundation established in 1977 by Bernard Osher, a businessman and community leader. His philanthropy has benefited a wide range of educational, cultural, and other nonprofit organizations primarily in the San Francisco Bay Area and his native Maine. In the 1990s, the Foundation funded a series of Osher Scholar programs that provide scholarship assistance for post-secondary education to nearly thirty colleges and universities as well as professional and technical schools in California and Maine.

It was a logical extension of the Foundation's focus on education to consider the needs of more mature students who are not necessarily well served by standard continuing education programs. Courses in such programs attract students of all ages who are matriculating to complete degrees or to acquire career-advancing skills. By contrast, the interest of more senior students, many of whom are at retirement age, is in learning that does not involve examinations and grades. They have put the climbing of career ladders behind them and want to learn for the joy of learning and personal fulfillment.

In the fall of 2000, the Foundation's leadership began looking into lifelong learning programs. It was fortunate in having an example of a highly respected program at the nearby campus of the University of San Francisco – the Fromm Institute of Lifelong Learning. The Fromm Institute, established by Alfred and Hannah Fromm nearly 30 years ago, is known not only locally but nationally for the quality, variety, and continuity of its educational programs for older adults. The Institute's executive director, Robert Fordham, was generous in providing counsel to the Foundation.

Initial Grants

In early 2001, the Foundation gave an endowment grant to the University of Southern Maine, which had a successful "Senior College" in operation. The grant made it possible for the University to improve and extend the excellent program it was already offering. The name of "Senior College" was changed to "Osher Lifelong Learning Institute."

Then contact was made with Sonoma State University in Northern California (a member of the California State University system), where a well-regarded community leader suggested developing a Fromm-like institution on the campus. In the summer of 2001, the Foundation awarded a \$100,000 annual grant followed by two annual renewals in the same amount recognizing the progress made in establishing and developing a fine lifelong learning program.

Second Cycle

During the fall and winter of 2001, the Maine and Sonoma programs continued to make exceptional progress in serving seasoned adults in their respective communities. The Foundation was pleased with the results and decided to join the “lifelong learning” field in a significant fashion. The concept of a network of Osher Lifelong Learning Institutes was compelling, and requests for proposals were sent to the remaining 22 universities in the California State University system as well as to the nine universities in the University of California system.

In November, 2002, the Foundation Board made initial grants of \$100,000 to six campuses in the CSU group (Bakersfield, Cal Poly at San Luis Obispo, Dominguez Hills, Hayward, San Francisco, and San Jose) and four campuses of the UC system (Davis, Riverside, San Francisco, and Santa Cruz). A separate award was made to the University of Vermont. In February, 2003, two more CSU campuses (Fullerton and San Bernardino) and two more UC campuses (Berkeley and Irvine) were awarded Osher Foundation grants along with the University of Hawaii at Manoa. With these additional grantees, the Foundation was supporting Osher Lifelong Learning Institutes on 18 campuses in four states. In April 2003, the outstanding progress demonstrated by Sonoma State University led to an endowment grant of \$1 million along with its third year of \$100,000 in operating grant support.

The First Osher Lifelong Learning Institute Conference

In order to provide a forum for the exchange of information and the encouragement of cooperation among members of the Osher Lifelong Learning Institute network, the Foundation supported a two-day conference, with Sonoma State University serving as host, in April 2003. Each of the campuses sent three-person teams to the event (including the out-of-state grantees -- Maine, Vermont, and Hawaii), and the response from the participants was uniformly positive. It is thought that such conferences might be an attractive feature of the Osher Lifelong Learning Institutes program going forward.

Characteristics of the Osher Lifelong Learning Institute Grants

1. The Foundation is not highly prescriptive in the type of lifelong learning program it will fund. Its main concern is to support the creation of new programs or the strengthening of existing programs in lifelong learning at college and university campuses. It sees that there are many variations on the theme and encourages each grantee to find a model best suited to the needs and interests of its community.
2. The Foundation encourages the involvement of emeritus faculty and sees the benefit of a close relationship between the university or college and the lifelong learning unit, including the provision of space on campus for its classes.
3. The Foundation hopes that any lifelong learning program will over time attract funding beyond the Osher grant(s), such as membership fees, in-kind support from the host institution, and local corporate and foundation contributions.
4. For its part, the Foundation offers grants of up to \$100,000 a year for up to three years to develop and implement lifelong learning programs. Upon demonstrated success, the Foundation will consider establishing endowments of at least \$1 million to support individual Osher Lifelong Learning Institutes.
5. 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.
6. While the current Osher Lifelong Learning Institutes are found in New England and the Western United States, Foundation support for a national network of such programs is anticipated.

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