

“The Bravest of the Brave”: A Conversation with Mary Bitterman and James Narduzzi

Mary Bitterman, former President and CEO of The James Irvine Foundation, is President of The Bernard Osher Foundation and Immediate Past Chairman of the Public Broadcasting Service (PBS). James Narduzzi is Dean of the University of Richmond’s School of Continuing Studies. The following discussion is based on Dr. Bitterman’s 2008 commencement address to graduates of the University of Richmond’s School of Continuing Studies.

CHER: In your speech, you used the expression “bravest of the brave” to describe older students who wanted to return to the classroom to earn a bachelor’s degree. Why the interest, and why the characterization?

Mary Bitterman (MB): The Foundation’s earliest scholarship efforts focused on individuals who have been called “traditional” students—students between the ages of 18 and 22—and who attend public and private universities in Bernard Osher’s native state of Maine and in Northern California, where Mr. and Mrs. Osher reside. The more we engaged in scholarship support, the more we recognized the special needs of somewhat older students, and, in the past several years, we have placed emphasis on scholarships for individuals whom we are calling “reentry” students, students ideally between the ages of 25 and 50 who have experienced a break in their education of at least five years and who have many years of employability ahead of them.

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Most of these reentry students have families to support, children to raise, and mortgages to pay. They work part- or full-time while trying to complete the required coursework for a bachelor's degree as well as related apprenticeships such as practice teaching. Without question, it takes a great deal of character and courage to pursue a degree after being out of an academic environment for more than five years. We hope that our scholarships not only provide financial assistance but serve to enhance the self-esteem of the recipients. This backdrop explains why I describe these impressive people as "the bravest of the brave."

CHER: The University of Richmond is one of 72 American universities and colleges participating in the Osher Reentry Scholarship Program. What are the issues associated with reentry students, and what has been the impact of the Osher Program at the university?

James Narduzzi (JN): At the University of Richmond, and I suspect elsewhere, the number one issue facing adult students is balancing their many obligations. Our typical adult student is working—mostly full-time—while juggling family, spouse/significant other, and/or children; is actively engaged in the community through civic, social and volunteer organizations; all the while attending school one, two, three nights per week or on weekends, often for five, seven, or even ten years. It is an enormous challenge and commitment, made even more so if finance is an issue.

While many employers offer tuition assistance programs, not all do and few cover the entire cost of an education. For students unable to receive assistance from their employer, finance becomes a critical variable, slowing down progress toward a degree or curtailing it altogether. Seeking scholarship support for our students has thus been our number one fundraising priority. The Osher Reentry Scholarship Program has allowed us to provide \$2,000 grants to 25 students each year for the past two years. Going forward, the endowment gift has doubled our capacity to provide financial assistance to adult students.

These figures are of course impressive by themselves. But the hard data fail to adequately communicate the enormous impact that these grants have had on the lives of individual students. During Mary's visit to our campus in early May, several students or their spouses came up to let us know that they were Osher Scholars and that they could not have finished without

this support. And each story is so compelling. The spouse whose business was struggling, forcing his wife to drop out until an Osher grant became available. Or the single parent raising multiple children who was enabled to expedite her transition from instructional assistant to classroom teacher because of the Osher grant. These anecdotes were repeated over and over here at Richmond and likely at every college and university that has benefited from Osher support. At the end of the day, this is what matters and this is why the Osher Foundation's work is so important.

CHER: In addition to the reentry program, the foundation is also making a commitment to California community college students. The choice of California is obvious because of the Oshers' personal ties, but why target community colleges?

MB: In early May, just before I traveled to Richmond to give my commencement talk, Governor Arnold Schwarzenegger announced in Sacramento the "Osher Initiative for California Community College Students," a \$70 million commitment starting with an outright gift of \$25 million and an additional pledge of \$25 million in matching funds for the California Community Colleges Scholarship Endowment. We also pledged \$20 million to several University of California (UC) and California State University (CSU) campuses that did not already have Osher-funded scholarship programs to establish endowed scholarships expressly for students transferring to those universities from California community colleges.

The issues of access and affordability of higher education are significant for growing numbers of Americans. The fact is that the California community college system enrolls 2.6 million students—a quarter of all community college students in the country. It comprises 72 districts and 110 colleges offering more than 175 degree and certificate programs. Its students are the least advantaged and the most diverse of those attending institutions of higher education in the State. Nearly 60 percent of the students graduating from the four-year colleges of the CSU system transfer from two-year community colleges, and the same is true of 30 percent of the graduates of the UC system. These transfer students have grade point averages equal to or better than those of students who started as freshmen at the four-year campuses. Many students choose to do their basic coursework at a community college to keep costs as low as possible, hoping to save enough

money for eventual transfer to a four-year program. So in terms of scope, worth, and need, California community colleges and their students offer a tremendous opportunity for the Foundation to have an impact within the state, especially during a period of diminishing State funding for higher education and economic stress for individuals.

CHER: How do community colleges affect the lives of students in Virginia and in particular at the University of Richmond?

JN: Like California, the Commonwealth of Virginia has a very large and comprehensive community college system serving all areas of the state. Some 65 percent of the current adult student population in the School of Continuing Studies has prior community college experience. We currently have articulation and dual admission agreements with the two community colleges in central Virginia. Additionally, we currently offer our Weekend College program on-site at three community colleges across the state, with plans for additional expansion.

As a matter of strategy, we have focused on partnering with the local community colleges and have refocused our curriculum on the last two years of a bachelor's degree. As a practical matter, more and more adult students have gravitated to returning to higher education through community colleges. So we have tried to reflect that in our programs and in our marketing and have tried to capitalize on that trend in our relationships.

CHER: The Osher Foundation has been proactive in identifying educational trends and responding to needs, as demonstrated by the lifelong learning initiative and the reentry scholarships. Looking ahead, what are some of the troubling and promising trends that the foundation staff is monitoring?

MB: On the troubling side, we would point to the low payout rate on endowments at a number of universities—especially as it affects scholarship support. The combination of the rising cost of higher education and reduced Federal and state budgets for scholarships at both public and private institutions makes such support more critical than ever. Our Foundation has promulgated a new spending policy for endowment gifts to our grantee institutions. We are requiring that expenditures in each year shall be at least fifty percent of investment earnings, net of investment expenses, but in no

event less than an amount equal to five percent of the invested principal amount. We have further provided that if net earnings are insufficient to meet the required payout and the grantee is unable to provide funds from other sources to meet the shortfall, then the principal amount may be invaded with the prior written approval of the Foundation. (I should note that, while we are as interested in protecting the integrity of the corpus and in providing for “intergenerational equity” as most people, our founder, Bernard Osher, places a high priority on having our grantees release sufficient scholarship funds to address the needs of this current student generation.) America’s trump card has always been providing educational opportunity for its people. Unfortunately, we are entering a period where many worthy students are either accumulating unconscionable amounts of debt by supporting their education with student loans or they are foregoing the possibility of higher education altogether—because it is just beyond their financial reach.

A promising trend is the steadily growing interest across the nation in lifelong learning, especially for seasoned adults. The data are quite clear that America’s population will reflect ever increasing percentages of older individuals; in fact, it is estimated by the US Census Bureau that the 12 percent of the American population now over the age of 65 will increase to 20 percent by 2030. It is important that older adults continue to have a good reason to get up in the morning, that they remain as fit as possible both mentally and physically, and that they focus on engagement in the world in which we live. We are but one of more than 100 foundations—along with many national groups such as AARP and Civic Ventures—that is placing emphasis on service to the older adult.

At this time, we are supporting Osher Lifelong Learning Institutes at 120 colleges and universities from Maine to Hawaii and Alaska. The institutes provide a diversity of courses and lectures, local excursions, and sometimes foreign travel programs for intellectual stimulation—with no requirements for homework, examinations, or term papers—simply learning for the joy of learning. Each institute also is appreciated for the social facilitation it promotes among its members. Our position is that institutions of higher education have a responsibility to the communities in which they are located—and that lifelong learning programs are one way in which such institutions can reach out and serve a larger and more diverse demographic.

The University of Richmond's Osher Institute is one of the most admired programs in our national network. In my commencement address, I quoted Wade Wood, 92 years of age, who attends the UR Institute with his daughter, Sally, a UR alumna and retired attorney. Mr. Wood noted that "age is no deterrent" to education. I reminded the audience that Bernard Osher would heartily agree. In celebration of his 80th birthday this past year, Mr. Osher started taking piano lessons.

CHER: How do funding sources such as your endowment and external funding support allow Richmond to keep up with educational trends?

JN: The issues surrounding endowment spending policies are complex with sometimes competing objectives. On the one hand, it is entirely reasonable for donors to want to see the full and immediate impact of their gifts. On the other, institutions want to ensure long-term endowment growth and stable finances over time. Richmond has a fairly sizeable endowment built carefully over a relatively short period of time. Those of us who work here benefit daily from the security and stability that the endowment provides. In fact, a case could be made that our endowment allows us to serve nontraditional students in ways and at a level that we otherwise could not. I think the creation of our Osher Lifelong Learning Institute is a great example. We could not have launched the institute without generous support from the Osher Foundation. That support allowed us to immediately hire talented staff that created exceptional classes that attracted a sizeable membership. However, equally key to our success was the fact that the University of Richmond embraced the institute from its inception, offering an array of services to its members that distinguish us in the marketplace. All of this would have been made more difficult if not impossible without the undergirding provided by our endowment.

So I think I understand the various perspectives on this issue. Ultimately, everyone's interests converge on the same objective—serving the educational needs of students right now and well into the future. Hopefully, everyone involved will arrive at common ground that addresses those needs.

In terms of trends, we have experienced significant growth over the past decade in both our credit and noncredit enrollments. On the credit side,

growth has been steady across all programs and at all levels. We have seen recent spikes at the graduate level in particular and anticipate that growth to continue. We also experienced enormous growth in our noncredit enrollments, particularly in enrichment programming and particularly among older adult learners. Thus, from our perspective, the timeliness of Osher Foundation support, both for the institute but also for scholarships, could not have been better. 🍷