Appendix A - Annual Report Format

Ancillary Unit Annual Report
Reporting Period: 2019-2020

Deadline for submission to Reporting Administrator:
By end of the 6th week of the Fall semester

This report is required by FAM 105.4 – POLICY GUIDELINES FOR THE FORMATION AND REVIEW OF CSUSB ANCILLARY UNITS – and must be submitted electronically.

1. Basic Information

Ancillary Unit's name	Osher Lifelong Learning Institute
Director(s)	Sue Anderson
Administrator to whom the unit reports ("Reporting Administrator")	Dr. Jake Zhu Dean, Palm Desert Campus
Purpose and goals of the Ancillary Unit (from the original proposal or updated operating documents)	The Osher Lifelong Learning Institute at Cal State San Bernardino is a membership organization for adults age 50+ that provides intellectually stimulating activities and university-level courses.

2. Advisory Board

Dr. Betty Baxter (member emeritus) – retired school administrator

Michael Hoffmann (chair, shared interest groups committee) – retired foundation administrator

Shelley Mitchell (chair, membership committee) – retired educator and grant writer

Jennifer Ridewood (chair, philanthropic giving committee) – retired nonprofit administrator

Sue Robinson Neeb (member at large) – retired human resources professional

Dr. Kevin Sweeney (chair, curriculum committee) – retired surgeon

Please attach the list of your current Advisory Board, along with their positions outside of the Advisory Board and their roles on the Advisory Board (if applicable).

3. **Ancillary Unit Activity**

Please summarize the top three (3) accomplishments of your Ancillary Unity (AU) during this reporting period. This should highlight the substantive activities that support and advance the purpose/goals of the AU, and the relationship between the activities and the purpose/goals.

Please highlight the most significant activities of the AU that engage the community or other entities on campus, if any.

Substantive Activities undertaken by the AU during reporting period

Activity (please describe)	Funds spent	Goal advanced (and extent)

The first intergenerational OLLI trip took place in September 2019, when 36 OLLI members and three undergraduate students from the Palm Desert campus traveled together to Washington, D.C. to experience the history and culture of our nation's capital. It was an extraordinary experience! OLLI members and university partners raised the money to pay 100% of the student expenses. Based on the wildly successful evaluations and comments from the follow-up student presentation, our OLLI will	No funds were spent. In fact, the Washington, D.C. trip generated $6,975 in new revenue from trip commissions.	This activity contributed to the successful completion of the following goals from the OLLI 2018-2020 Strategic Plan:
		
		Goal 6: Utilize university resources for operational integration
		  Engage more closely with the Palm Desert Campus
		  o Offer intergenerational programming
		  o Establish a PDC student scholarship

certainly explore more intergenerational learning and travel opportunities.		
Another significant activity was the execution of our first international educational trip to Croatia and Montenegro. We had a total of 44 travelers who enjoyed an exclusive 15-day small ship excursion in November. Despite the cool temperatures and frequent rain, it was an amazing learning experience that also helped build a strong sense of community among OLLI members. Our travel program has become a very popular part of our OLLI programming and has become a significant source for new revenue.	Again, no funds were spent on this trip. Revenue generated from trip commissions was an astounding $15,977.	This activity contributed to the successful completion of the following goals from the OLLI 2018-2020 Strategic Plan: **Goal 2: Sustain financial sustainability** 　Consider more revenue-generating activities **Goal 4: Continue membership growth** 　Create an exceptional member experience 　o Encourage social interaction to build a sense of community 　o Provide a variety of courses and experiences that appeal to diverse interests 　o Create opportunities for new members to connect
During this reporting period, another major activity was our unexpected shift to 100% online learning via the Zoom platform in response to the covid-19 pandemic. This change was unplanned and a whole new world to us. We literally made the shift from in person to online learning over a single weekend. That change involved not only learning how to use Zoom as staff, but convincing our instructors and members to make the leap with us. Within days, we learned this new technology and trained	No funds were used for this activity.	This activity contributed to the successful completion of the following goals from the OLLI 2018-2020 Strategic Plan: **Goal 1: Maintain a sound organizational structure** 　Continue focus on quality 　o Appropriate training and support for instructors and volunteers 　o Appropriate training and support for staff **Goal 3: Continue building a lively learning environment**

our instructors and members how to use it as well. It was truly the spirit of lifelong learning at its best.		Provide instructor training and support ○ Create an instructor handbook ○ Offer coaching when needed ○ Provide technology training and support, including a platform for sharing course materials with students

4. Describe planned activities for the current academic year and how each of them will advance the purpose/goals of the AU.

2020-2021 GOALS (from the OLLI 2020-2021 Strategic Plan)

Organizational Stability (Staff, Leadership Board)

Recommend an OLLI subcommittee to provide input on OLLI staff needs and hiring decisions

Membership Retention & Recruitment (Marketing Committee, Membership Committee)

Maintain connections with members
   a. Personalized, segmented communications (past, current, potential, welcome, thank you emails)
   b. Promote member referral program
   c. Continue and expand digital marketing (Facebook, email)
Retain a sense of community
   a. Instructor-driven connections directly with members
   b. Opportunities for small group activities and high touch experiences
   c. Continue and expand fun, interactive member events
   d. Creation of more shared interest groups
Increase volunteer involvement
   a. Use volunteers for personalized outreach
Retain & grow membership
   a. Review membership/fee options
   b. Update marketing language to highlight current benefits
   c. Update the marketing plan and budget

Program Quality & Experience (Curriculum Committee, Membership Committee)

Instructor recruitment & retention
   a. Expand instructor recruitment geographically
   b. Recruit more instructors from higher education
Quality & format of instruction
   a. Expand instructor training (offer workshops, update handbook)
   b. Review instructor vetting process (subcommittee, online interview or sample course)
   c. Leverage existing university resources for instructor recruitment, training & support
   d. Evaluate the possibility of on demand and recorded courses

Restructure programming for online delivery
    a.   Emphasize high-touch experiences
    b.   Offer instructor training for online course delivery
    c.   Recommend online class guidelines
Collaboration or reciprocity of course creation/delivery with others
    a.   Research sharing classes with other OLLIs
    b.   Establish discussion groups based on other free resources

Financial Management (Leadership Board, Development Committee)
Review membership and fee structure for possible future changes
    a.   Review fee/no fee status for Shared Interest Groups
Establish a subcommittee to research instructor pay options
Include a donation requirement for Leadership Board members
Create a development plan

5. Attach the completed Annual Use of Funds form.

Susan Anderson
Susan Anderson (Mar 12, 2021 11:57 MST)

Sue Anderson

Director Name   Director Signature

Susan Anderson   Susan Anderson
                                   Susan Anderson (Mar 12, 2021 11:57 MST)

Co-Director Name   Co-Director Signature

Susan Anderson   Susan Anderson
                                   Susan Anderson (Mar 12, 2021 11:57 MST)

Co-Director Name   Co-Director Signature

Unit Reporting Person recommendation	
Name and title: Jake Zhu, Dean, Palm Desert Campus	
X	Keep on active status.
	Move to probationary status.
	Move to inactive status.

Recommendations and comments including the criteria and data reviewed. Please attach additional page(s) as necessary.

The Osher Lifelong Learning Institute (OLLI) at the CSUSB Palm Desert Campus is a program designed for adults 50 and older who want to experience learning for the fun of it. OLLI offers non-credit, university-level courses, but without the grades, tests or homework. Membership is open to adults who enjoy learning, regardless of their educational background. Courses are taught by current or retired university professors or accomplished professionals with significant expertise in their field. OLLI membership is also a great way to build a strong social network of interesting friends.

In 2019-2020AY, OLLI provided 25 to 30 courses each quarter (OLLI still offers courses on a quarterly basis) to about 900 members on site until March 2020. Then the OLLI operation switched to remote learning and delivered all courses online during spring of 2020. OLLI hosted many OLLI events and social gatherings onsite prior to March 2020 and online during the pandemic.

Budget wise, OLLI is a self-support institute. The revenue largely comes from OLLI endowment, local donations, membership, course fees and travel program income. Travel program was not offered from March to June 2020 and membership recruitment becomes a challenge during the pandemic, which may affect revenue generated from membership.

We hope to rebuild membership momentum post pandemic, therefore, I recommend to keep OLLI active.

Unit Reporting Person Signature _____   Date: 3/15/2021

FORWARD AN ELECTRONIC COPY OF THIS REPORT TO sylvia.myers@csusb.edu AND SEND THE ORIGINAL COPY TO THE FACULTY SENATE AD-155. THE SENATE OFFICE WILL TAKE CARE OF THE REMAINING PORTIONS OF THE REPORT. THANK YOU.

CALIFORNIA STATE UNIVERSITY
SAN BERNARDINO

Academic Affairs
Faculty Senate

Educational Policy and Resources Committee recommendation (if applicable)	
	Keep on active status.
	Move to probationary status.
	Move to inactive status.

Recommendations and comments including the criteria and data reviewed. Please attach additional page(s) as necessary:
EPRC Chair Signature   Date

Provost recommendation (if applicable)	
	Keep on active status.
	Move to probationary status.
	Move to inactive status.

Recommendations and comments including the criteria and data reviewed. Please attach additional page(s) as necessary:

Provost Signature   Date

President decision (if applicable)	
	Keep on active status.
	Move to probationary status.
	Move to inactive status.
Recommendations and comments including the criteria and data reviewed. Please attach additional page(s) as necessary:	

Appendix B – AU Proposal Budget Format

	Year 2020-21		Year 2021-2022 Option 1		Year 2021-2022 Option 2	
	Internal	External	Internal	External	Internal	External
Salaries	$ 225304	$ -	$ 196708	$ -	$131609	$ -
Assigned Time	$ -	$ -	$ -	$ -	$ -	$ -
Travel	$ -	$ -	$ -	$ -	$ -	$ -
Supplies	$ -	$ -	$	$ -	$ -	$ -
Contractual	$ 45,000	$ -	$ 45000	$ -	$45000 -	$ -
Other	$ 25,000	$ -	$ 25000	$ -	$25000	$ -
TOTAL	$ 295304	$ -	$ 266708	$ -	$ 201609	$ -

*2021- 2022 – Option 1: 1 Full Time Director and 1 Full Time Support Staff/Benefits
*2021- 2022 – Option 2: 1 Full Time Program Coordinator, 1 Full Time Support Staff/Benefits

**Estimated by PDC Budget Office on March 15 2021

*Other can include items such as:
External Contracts
Grants
Sponsorships
Marketing and Outreach
Communications
Data Processing
Facilities Operations
Printing
Postage