

Ancillary Unit Annual Review
Reporting Period: 2021-2022

Deadline for submission to Reporting Administrator: October 30

**This report is required by FAM 105.4 – POLICY GUIDELINES FOR THE FORMATION
AND REVIEW OF CSUSB ANCILLARY UNITS**

Basic Information

Ancillary Unit's name	Osher Lifelong Learning Institute
Director(s)	Angela Allen
Administrator to whom the unit reports ("Reporting Administrator")	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.

Advisory Board

Please list your current Advisory Board, their positions outside the Advisory Board, and their roles on the Advisory Board (if applicable)	<p>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</p>
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Ancillary Unit Activity

Please summarize the top three (3) accomplishments of your Ancillary Unit (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)
<p>In September 2022 we received an award of \$4,750.00 from the CSUSB Instructionally Related Activities to implement the Sages & Seekers Intergenerational Program. Solicit Funds cover the cost of purchasing the</p>	<p>\$3,200 for the cost of the program license. Anticipating the remaining funds to be spent on student assistant</p>	<p>Goal 6. create transformational learning opportunities that nurture and sustain the intellectual, environmental, economic, and cultural richness of the Coachella Valley by collaborating with and investing in students</p>
<p>Return to in-person learning. September 2022 was the first time in 2 1/2 years OLLI members set foot on campus. Classes that in the past had 50 to 100 people now struggle to get 20 to attend. In order to transition to in-person, we set a curriculum goal of 50% in</p>	<p>No funds were spent on this. Interest was driven by social media and on-line promotion using Self-created videos</p>	<p>Goal 4: Continue membership growth. Create an exceptional member experience. Encourage social interaction to build a sense of community o Provide a variety of</p>
<p>Established a collaborative agreement with The Cathedral City Sr. Center to provide OLLI courses that are affordable and accessible for the City's Senior demographic. Adding new members</p>	<p>\$150. in instructor costs</p>	<p>Goal 6. create transformational learning opportunities that nurture and sustain the intellectual, environmental, economic, and cultural richness of the Coachella Valley by collaborating with and investing in students, faculty, staff and communities</p>

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

Planned Activity	Connection to Purpose
<p>Coordinate with Community Outreach planning committee in event planning Feb. 2023 and May 2023 community/campus event to include OLLI volunteers and activities as part of the events.</p>	<p>Goal# 4 Community Engagement and Partnerships: Develop and enhance communication and collaboration with community partners</p>
<p>Initiate Pilot Sages & Seekers Intergenerational Program with OLLI members and CSUSB Relational Communication curriculum students in 2023 academic year</p>	<p>Goal# 1. Student Success: providing learning experiences that promote student success, achievement... Prepare students to contribute to a dynamic society</p>
<p>Collaborate with California Indian Nations College (CINC) to provide courses for Coachella Valley Tribal Elders</p>	<p>Goal #5 Identity: Build an identity that celebrates the uniqueness of our university, promotes our accomplishments and inspires involvement. Meeting DIE goals.</p>
<p>Offering CSUSB Students free entrance to OLLI courses. Your Best Health Now series sponsored by Desert Health Journal, and Eisenhower Medical Center provides lectures from 6 community health care providers was offered to Kinesiology and Health Science</p>	<p>Goal# 1. Student Success: providing learning experiences that promote student success, achievement... Prepare students to contribute to a dynamic society</p>

Complete the Annual Use of Funds form

	Year 1		Year 2		Year 3	
	Internal	External	Internal	External	Internal	External
Salaries	\$ 21,670	\$	\$ 54,550	\$	\$	\$
Assigned Time	\$	\$	\$	\$	\$	\$
Travel	\$ 971.75	\$	\$ 00	\$	\$	\$
Supplies	\$ 14,957	\$	\$ 1,472.5	\$	\$	\$
Contractual	\$ 4,900	\$	\$ 850.00	\$	\$	\$
Other*	\$ 760.42	\$	\$ 1,591.4	\$	\$	\$
TOTAL	\$	\$	\$	\$	\$	\$

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

Certification

Angela Allen

Director Name

Co-Director Name


Co-Director Name

Angela Allen

Director Signature

Co-Director Signature

Co-Director Signature

Unit Reporting Person recommendation	
Name and title: Jake Zhu, Dean, Palm Desert Campus	
Recommendation:	Active
<p>Recommendations and comments including the criteria and data reviewed. Please attach additional page(s) as necessary.</p> <p>OLLI is a self-supported and membership driven program that serves the 50+ population in the Coachella Valley. The Covid-19 pandemic has a huge impact on the size of its membership. Angela Allen, the OLLI director, has been working on increasing operational funds through fundraising and membership with outreach. Progress is made and we hope to grow the membership to 500 this academic year.</p>	
 <small>Jake Zhu (Nov 10, 2022 15:31 PST)</small>	Nov 10, 2022
Unit Reporting Person Signature	Date