



# Annual Report

In July 2023 our program moved from USF Innovative Education’s oversight to its new home under the University Community Partnerships umbrella. This newly formed department focuses on building the university’s brand with internal and external partners. OLLI is already aligned with that mission as we continue to expand our reach throughout the county. This year we offered 340 courses and 24 free Friday lectures at 27 venues throughout Tampa Bay.

OLLI experienced several unexpected financial challenges this year with overhead cost and benefit changes from USF in addition to a lower distribution than planned from the endowment account. We are also sad to say that one of our long-term valued partners, Unisen Senior Living (formerly University Village of Tampa) is now bankrupt. We have taken

several mitigating actions. We added new partnerships with retirement communities Brookdale Bayshore Senior Living and



Discovery Village of Tampa Palms and will provide programming at Aston Gardens during the next fiscal year. We raised and exceeded fund-raising goals, made some changes to class prices, removed the OLLI Bird discount and we reduced the catalog print costs by switching to an online catalog and a much smaller printed preview brochure in our third semester.

Over half of the courses offered this year were new. A higher number of classes and events met in-person. About 23% of classes continue to be on zoom. Members who are unable or reluctant to drive, and those who live or travel out of state, are still able to participate in OLLI-USF. Members can also take advantage of OLLI Encore, our recorded classes. Of the 162 volunteer instructors 52 were new to teaching for OLLI. Our Shared Interest Groups (SIGs) are thriving with growth in both the number of SIG programs and in the number of members taking part. Our members say that OLLI is fun, engaging, intellectually stimulating and life-enhancing. Ron Weaver, OLLI instructor, volunteer and floor manager at our Open Houses, says “OLLI-USF is my land of opportunity.”

## MESSAGE FROM THE DIRECTOR

One of my main goals for OLLI-USF is to expand our visibility on the university campus and in the community. I was thrilled to moderate The Jewish Geography: Shanghai event and engage with members of our China SIG and local community group. The USF Homecoming Parade I attended with Operations Manager, Cath Mason, was spectacular. This year I have had the pleasure of attending many enriching events: From the inaugural USF Bulls Family Fest to the enlightening Synapse Summit, from the inspiring Meals on Wheels Partner Breakfast to the launch of our new partnership with Aston Gardens and meeting General Frank McKenzie at the USF Global and National Security Institute Conference. It was an honor to meet with Karen Holbrook, the regional chancellor for USF Sarasota-Manatee who welcomes the opportunity to collaborate. I attended my first ever OLLI National Conference with our

Advisory Board Chair, Linda Feeney. I was a guest presenter at several events including The Greater Brandon Kiwanis meeting.

I was honored to attend the Donor Appreciation Lunch, where nearly 40 of our generous donors gathered. Contributions are vital to our program’s success, and I cannot thank donors enough for your continued support. This wonderful event was coordinated by our Development Committee Chair Kevin Chittim and sponsored by the USF Foundation and the foundation’s Marion Yongue, associate vice president of university



*OLLI-USF's Director,  
Veronica Maxwell, M.Ed.*

*(continued)*

development.

“Powered by Connection” was this year’s theme for May’s Older Americans Month, led by the U.S. government’s Administration for Community Living. “Powered by Connection,” highlights the profound impact that meaningful relationships and social connections have on our health and well-being. Here at OLLI, our members exemplify the spirit of connection in every way. From the camaraderie shared at events like the Volunteer Appreciation Breakfast to the joyous gatherings at the annual Member Appreciation Picnic, through the activities of our vibrant Shared Interest Groups (SIGs) and shared travel experiences, our community thrives on the bonds we create with one another. Our members’ creativity blossoms in OLLI Life, the monthly OLLI newsletter and in OLLI Connects, the weekly OLLI blog both of which showcase member experiences, connection and communication.

Our desire to share the wonders of lifelong learning drives us to expand our visibility, to connect with more individuals who share our passion, and to create an even more vibrant and inclusive learning environment. Thanks to your unwavering support, we welcomed 503 new members into our vibrant community. Each new member brings fresh perspectives, diverse experiences, and boundless enthusiasm for learning.

*Veronica Drmill*

## Message from The Board Chair

Volunteers expressed a preference for more project-oriented engagements as opposed to the more traditional committees. In response, the Board simplified its by-laws and developed operating procedures that allow for more flexibility and cross-discipline involvement. The Board of Advisors and the OLLI-USF committees focused on ways to increase membership, recommended changes to program pricing, increased support to new instructors, developed substantial increases in member and donor giving and created innovative programs to engage and acclimate new members into the social fabric of our OLLI.



*Linda Feeney*  
*Chair OLLI-USF Board of Directors*





## MEMBER GENEROSITY

Thanks to the generosity, loyalty and commitment of more than 120 donors and several sponsoring organizations, the OLLI Annual Fund reached \$94,613 for this fiscal year. Planning for OLLI's long term future means focusing on growing member bequests. This year planned legacy gifts nearly doubled to \$1 million. In 2025, our fundraising efforts will include greater emphasis on grant writing and identifying additional major corporate donors. Each May OLLI honors and celebrates donors at a donor appreciation event.



## MEMBERSHIP COMMITTEE

Our membership committee, led by Pam Tyler, focused on encouraging membership growth in Pasco County. The committee hosted a special OLLI event at Bay Care Hospital in Wesley Chapel, featuring two mini-lectures by OLLI instructors Sheryl Long and Robert Jacob. Committee members staffed OLLI outreach tables at events in Temple Terrace, Wesley Chapel, Carrollwood, and Zephyrhills and spoke to groups such as Tampa Women's Newcomers Group. The committee also focused on improving the new member experience at OLLI-USF by reaching out to new members at Open House and at regular new-member brunch gatherings. This year they launched their vision of "Circles" designed to foster membership connections at the local level, hosting social events all over the Tampa Bay area that catered to groups linked by zip code. In the spirit of bringing members together, the committee promoted an active search for a new OLLI space on campus that would enable groups of members to get together.

## FINANCE COMMITTEE

Bruce Gobioff, chair of OLLI's finance committee welcomed two new members this year. The committee monitors monthly financial reports, monitors progress against budget including membership and registration status, fund raising, and travel revenue and identifies areas for improvement. This year the committee developed a new pricing template for classes and a spreadsheet template for its monthly presentations of financial data to the Advisory Board. The committee participated in the annual budget review for the next fiscal year. This was Bruce's final year as chair. We cannot thank him enough for his years of dedicated volunteer work on this committee.

## VOLUNTEER ENGAGEMENT COMMITTEE

The Volunteer Engagement Committee (VEC) assisted in the recruitment of volunteers as requested by senior leaders, staff, and committee chairs. They welcomed 16 new volunteers at 5 information sessions. OLLI celebrated our 133 volunteers at the wonderful annual Volunteer Appreciation Breakfast which they organized. 14 award winners were honored at the event and three instructors were added to the Roll of Honor.

## SHARED INTEREST GROUPS

Three new SIGs formed this year raising the total number of SIGs to 16. There's something for everyone: from games to movie discussions, self-hypnoterapy to gardening activities and local cultural trips. Three language SIGs and two writing SIGs provide opportunities for members to build skills. Our OLLI SIGs are out and about in the community with photoshoots for Shutterbug members, tours of organic farms and community gardens for the Food Glorious Food SIG. The Outdoors SIG enjoyed many educational excursions in addition to hikes, kayak and bike trips, The China SIG celebrated the Lunar New Year at Water Works Park in Tampa and introduced the Operatunity SIG to Chinese operas and performances. Operatunity SIG members supported USF School of Music by attending a fundraiser event. Food Glorious Food SIG and Operatunity SIG continue to support USF's Feed-A-Bull with donations.

## TRAVEL OPPORTUNITIES

OLLI is fortunate to have a knowledgeable, hard-working, hands-on volunteer Travel Opportunities Committee (TOC) that develops a varied annual travel program. This year the committee expanded OLLI's travel partnerships, adding Mayflower and Collette travel companies. Trips included Colorado's Historic Trains in August 2023, and October's Albuquerque Balloon Festival. In honor of the 80th anniversary of D-Day landings, members took a Memorials of World War II trip to Normandy that included excursions in London and in Paris. TOC exceeded its goal for the fiscal year and raised \$11,521 for OLLI-USF.



## OLLI-USF by the Numbers

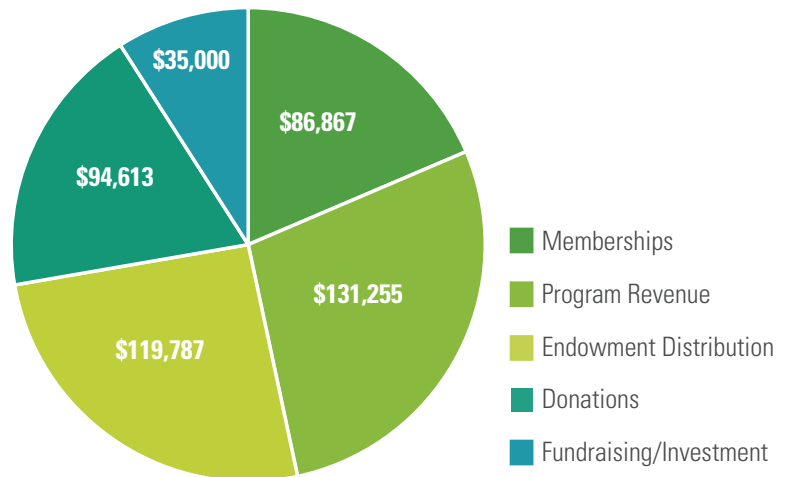


\*162 includes the new instructors

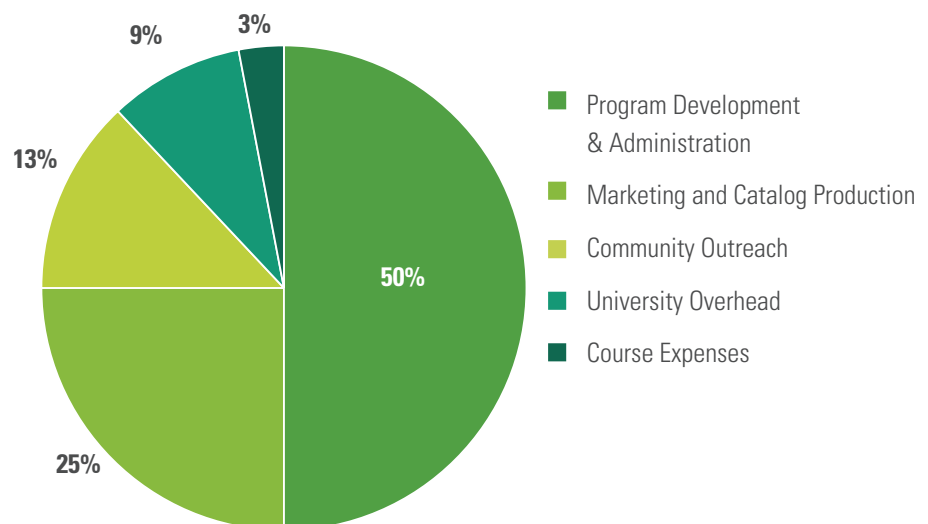
## OLLI-USF Financial Analysis

Much thanks to the Osher Lifelong Learning Foundation and our other generous donors. The endowment created by the foundation donation and the funds from other donors enable OLLI-USF to keep membership and course registration fees relatively low. We appreciate all of our many donors.

### OLLI-USF Income, BY SOURCE \$467,522



### OLLI-USF's Operating Expenses, BY TYPE \$455,439



This report was prepared by the Advisory Board and staff of  
**Osher Lifelong Learning Institute at the University of South Florida**

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