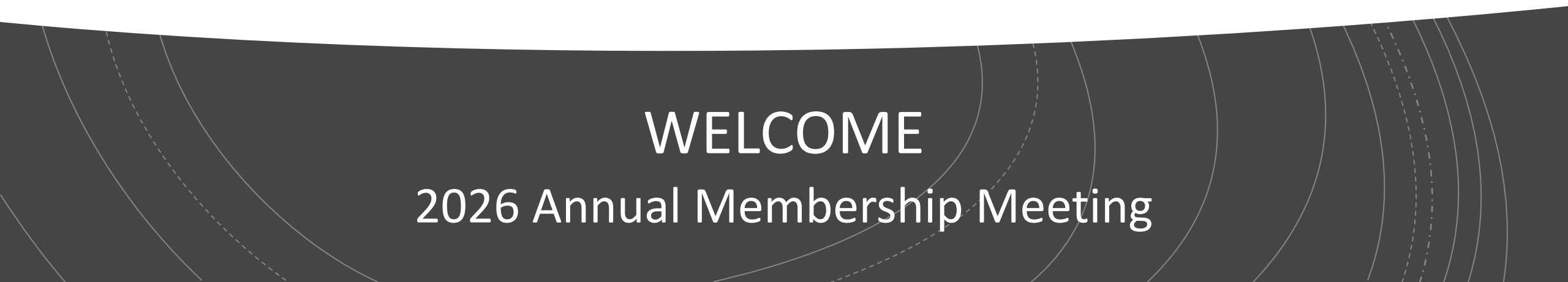




Southern OREGON UNIVERSITY



WELCOME
2026 Annual Membership Meeting

John Schuyler
2025-26
President

- **Welcome, OLLI Members!**
- **Call Meeting to Order**

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In Memoriam

Annual Meeting Agenda

- Adoption of Agenda
- Approval of 06/06/25 Annual Meeting Minutes
- Guest Speaker
- 2025-26 Highlights
- Financial Report & Planning
- Member Satisfaction Survey
- OLLI Staff Update
- VP/President-Elect Comments
- Member Questions & Comments
- Closing Remarks
- Adjournment

A red speech bubble graphic with a white outline, containing the text "Guest Speaker".

Guest Speaker

Rick Bailey
SOU President

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Short Q&A for Rick

2025-26 Highlights

- OLLI 2030 Strategic Plan Implementation
- Travel Pilot Project
- Membership Growth
- Courses, Programs, & SIGs
- Alternative Venues & Partnerships
- Social Events
- OLLI OLLI, Oxen Free!

OLLI at SOU Strategic Plan 2030

Vision

OLLI at SOU members will find intellectual stimulation, enjoyment, and invigorating learning opportunities in an accessible, comfortable, supportive, and congenial environment.

Mission

OLLI at SOU is a member-driven educational community primarily serving adults ages 50 and better. We offer a diverse repertoire of courses and programs designed to foster lifelong learning, encourage social interaction, and provide cultural enrichment.

Values

Learning

Curriculum

Activities

Excellence

We recognize the vital relationships among social interaction, creative expression, and healthy aging.

We honor the breadth and depth of our curriculum taught by volunteer instructors and we promote programs that inspire members to participate in OLLI and the broader community.

We value activities that inspire our members to volunteer their time, talent, skills, and resources.

We measure our success by members' satisfaction with our curriculum, affordability, social opportunities, staff, and leadership.

Guiding Principles

Goals

Structure

To maintain a top-notch organization of volunteers, staff, partners, and locations.

Curriculum

To create and maintain high-quality learning opportunities led by engaged and well-versed instructors that inform, educate, and entertain members.

Connection

To facilitate connections among OLLI at SOU members and within communities to promote learning, cultural enrichment, and social interactions.

Sustainability

To assure a stable balance of finances and membership growth to sustain OLLI at SOU for the next five years and beyond.

OLLI 2030 Strategic Plan Implementation

Structure

- Succession planning for officers and chairs
- Amended OLLI at SOU Bylaws

Sustainability

- Grow membership

Curriculum

- Pilot and evaluate courses outside M-F, 9-5
- New course venues beyond Ashland: 22 alternative venues hosting 74 courses

Connection

- More member-driven SIGs (now up to six)
- Host five one-time presentations, offer game afternoons, initiate a welcome back all-member breakfast, host an OLLI member art show + volunteer fair

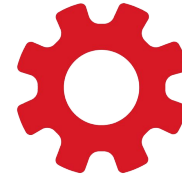
Volunteer Engagement Revamp



**Community
& People**



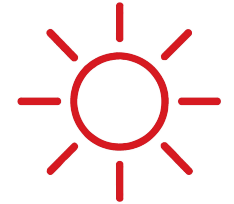
**Creative &
Storytelling**



**Organizing
& Planning**



**Active &
Hands-on**



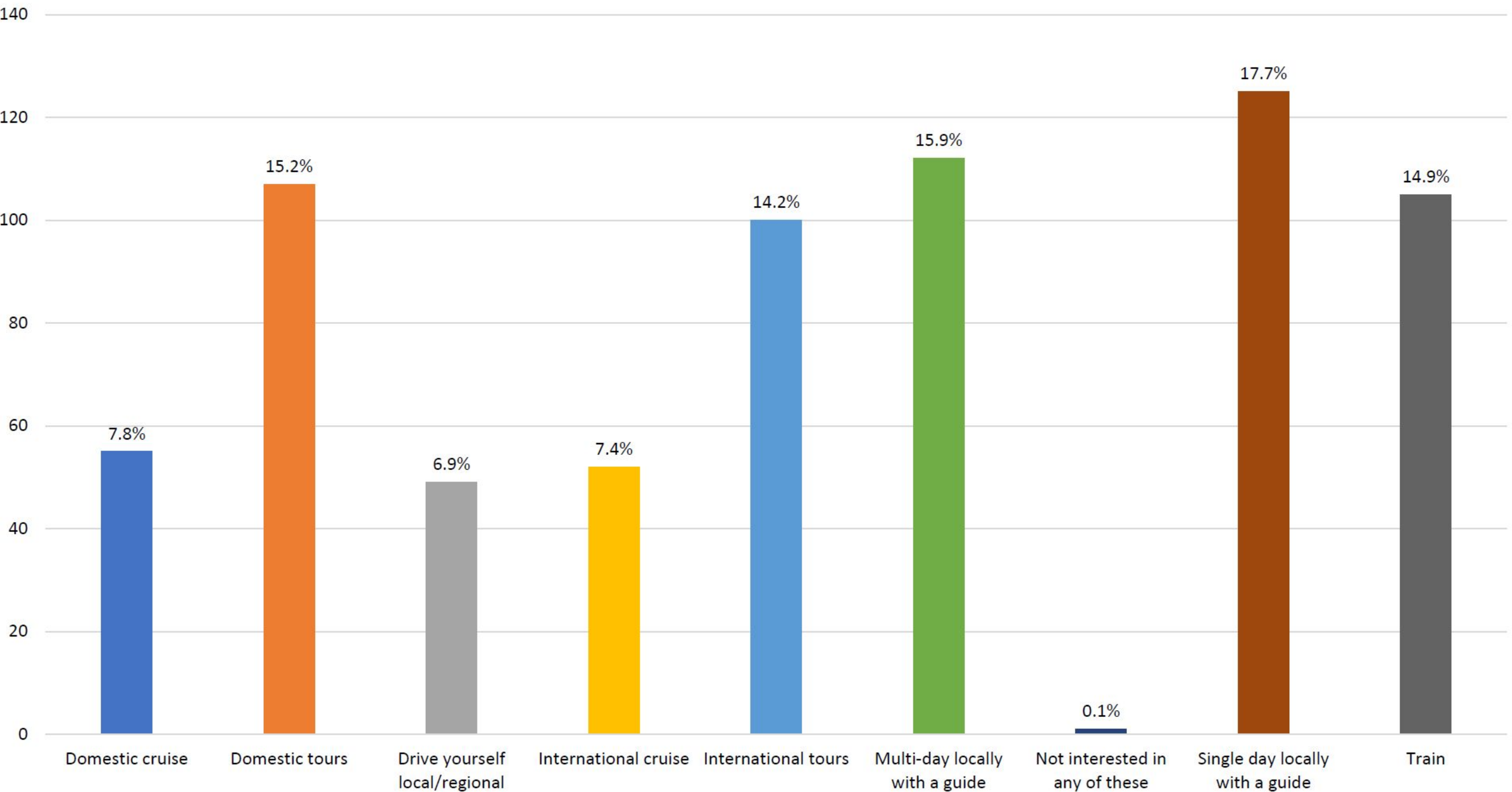
**Flexible &
Open**

- Held a successful Volunteer Fair and Member Art Exhibit in January 2026
- Shift from long-term commitments to volunteering based on interest areas
- Deployment of “work teams” within committees that have specific duties or short-term projects

Travel Pilot Project

- Piloted travel for a second year
- Expanded regional trip offerings, as preferred by members
- Our 2026 African safari and European Christmas market cruise are sold out
- Considering making travel a permanent standing committee

What types of OLLI travel trips appeal to you the most?



Membership Growth

- Above 2,100 prior to pandemic
- Significant dip during COVID
- Currently approaching 2,000
- Goal is 2,200 by 2030

Membership Growth

	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
Total Members:	2121	2114	1362	1426	1688	1711	1851	1967
New	477	399	235	237	385	337	367	429
Renewing	1,644	1,715	1,127	1,188	1,303	1,374	1,484	1,538

Unique Courses

	Fall	Winter	Spring	Total
2018-19	135	103	124	362
2019-20	134	105	104	343
2020-21	105	73	80	258
2021-22	92	79	92	263
2022-23	119	125	112	356
2023-24	122	109	141	372
2024-25	133	135	114	382
2025-26	146	114	136	396

Programs and SIGs

2025-26 Shared Interest Groups (SIGS):

- Building Watercolor Skills (Online)
- Guitar Jam
- OLLI Raider Fans
- Online Book Club
- Poker Enthusiasts
- Zentangle

2025-26 Programs and Activities:

	Fall 2025	Winter 2026	Spring 2026	2025-26
Activities	1	1		2
One-Time Presentations	4	2	3	9
Talk to Us Interviews	3	2		5
Totals:	8	5	3	16





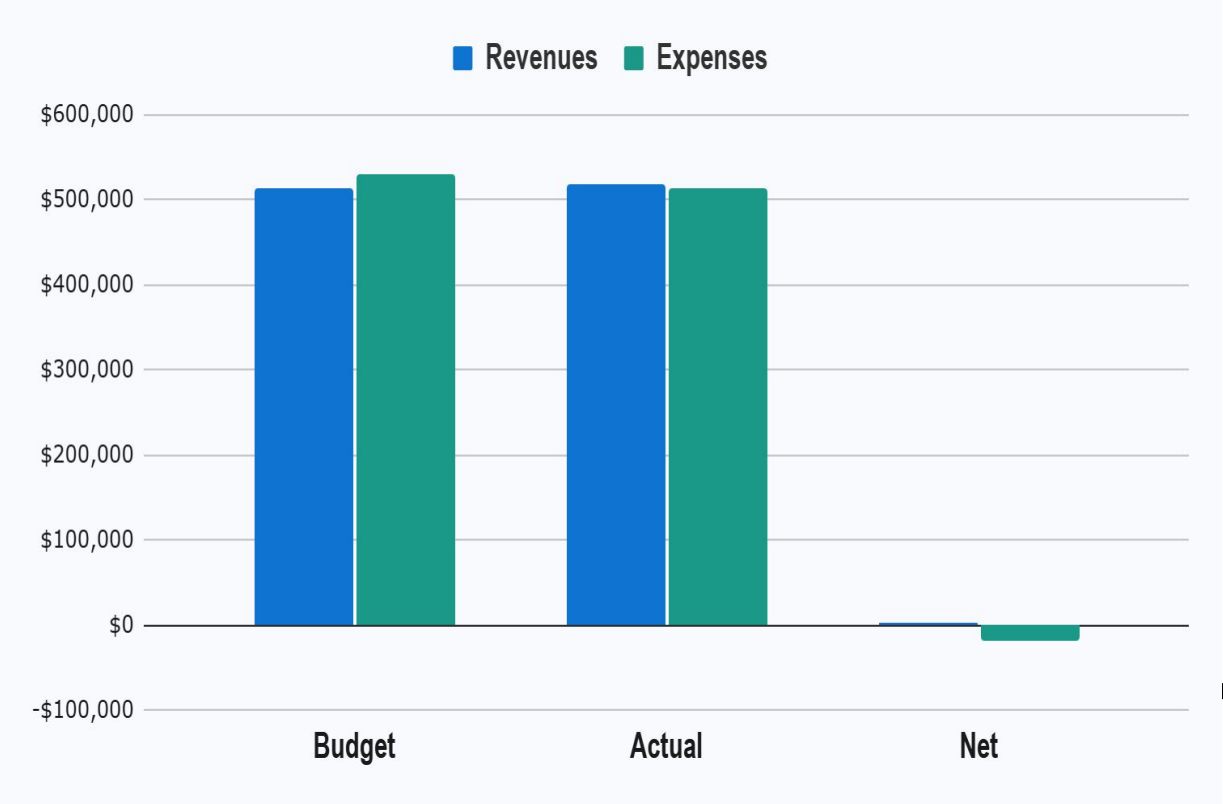
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Financial
Report and
Planning

Myrna Hall
OLLI Treasurer

OLLI at SOU Financial Update

Projected Fiscal Year 2025-26

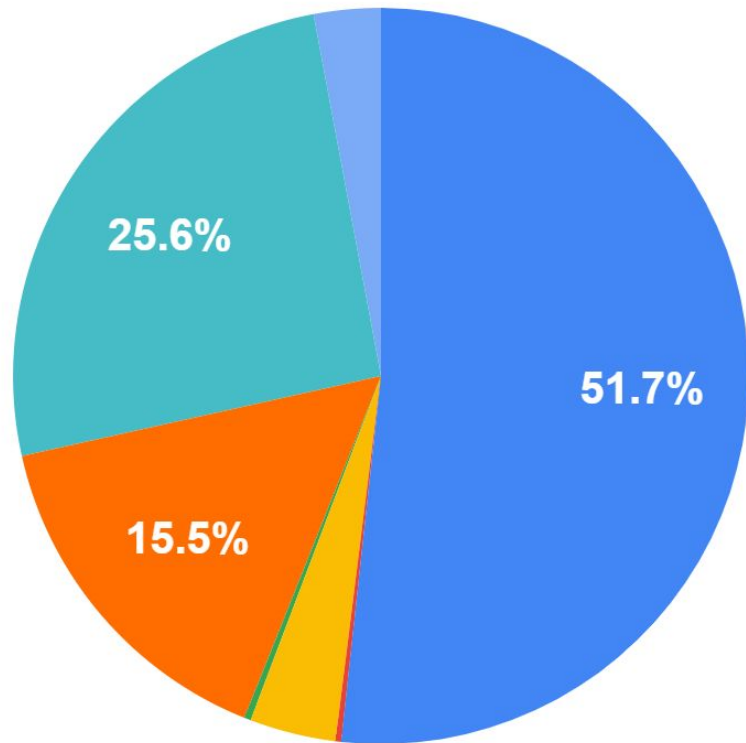


	Revenues	Expenses	Net
Budget	\$514,617	\$531,676	-\$17,059
Actual	\$517,699	\$514,601	\$3,098
Difference	\$3,082	-\$17,075	\$20,157

Projected data, subject to close of the FY

OLLI at SOU Financial Update

Projected Revenue Fiscal Year 2025-26



	Membership Fees	\$ 267,782
	Travel fees	\$1,298
	Fundraising Events	\$19,620
	Sponsorships	\$1,500
	Contributions	\$80,000
	Osher Distribution	\$132,296
	Other Income	\$15,203
	Total Revenues	\$ 517,699

Projected data, subject to close of the FY

Fundraising Update

\$87,586

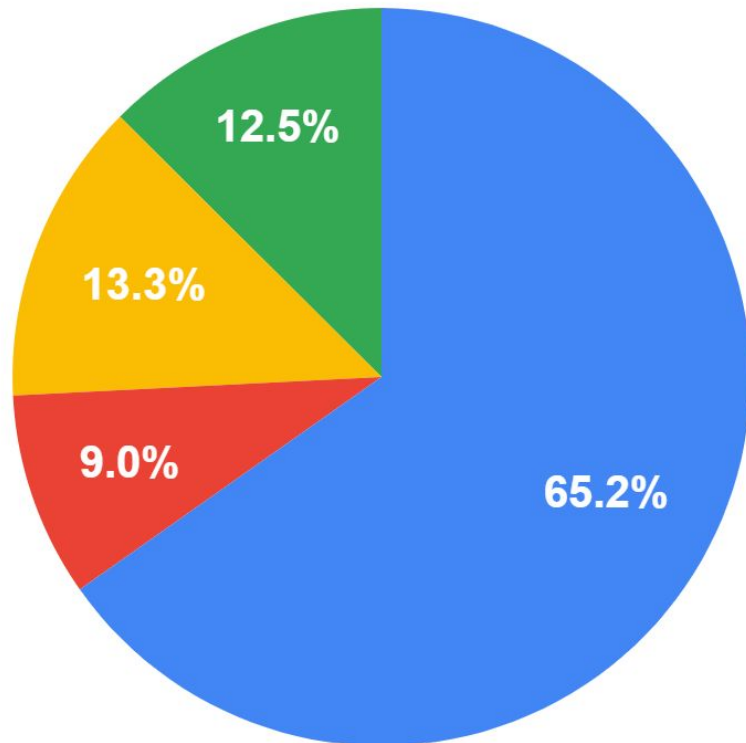
from 415 gifts

We are only \$2,414 from our goal.

giving.sou.edu/olli or hand us a check!

OLLI at SOU Financial Update

Projected Expense Fiscal Year 2025-26

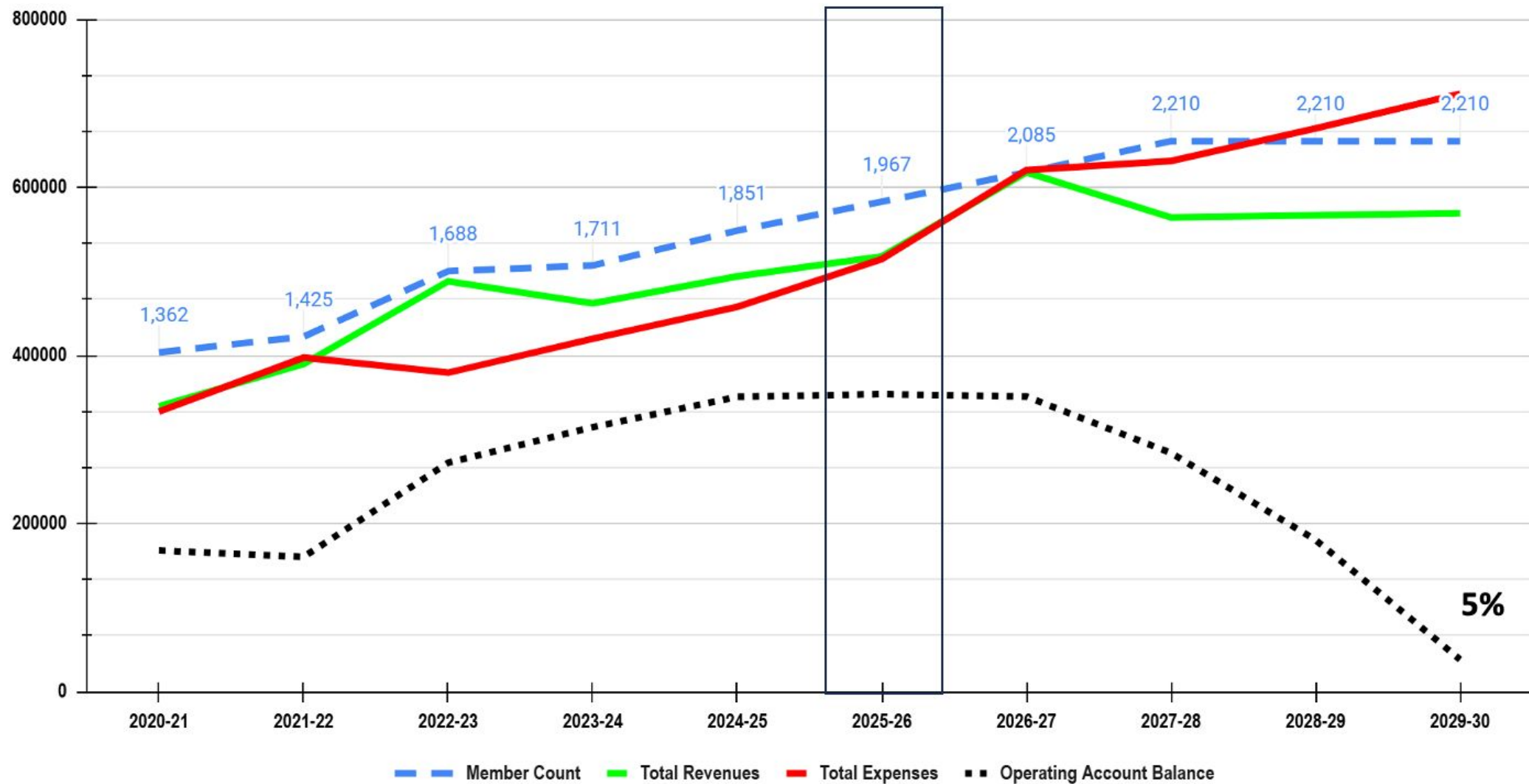


Personnel	\$335,706
Facilities/Parking	\$46,121
Office Ops/Business Services	\$68,239
Program/Marketing/Fundraising	\$64,535
Total Expenses	\$514,601

Projected data, subject to close of the FY

OLLI at SOU Financial Projection

At-A-Glance: OLLI at SOU Member Counts, Revenues, Expenses, Fund Balances



OLLI at SOU members are invited to attend or listen in on Council meetings the third Tuesday of every month.

Email us at olli@sou.edu

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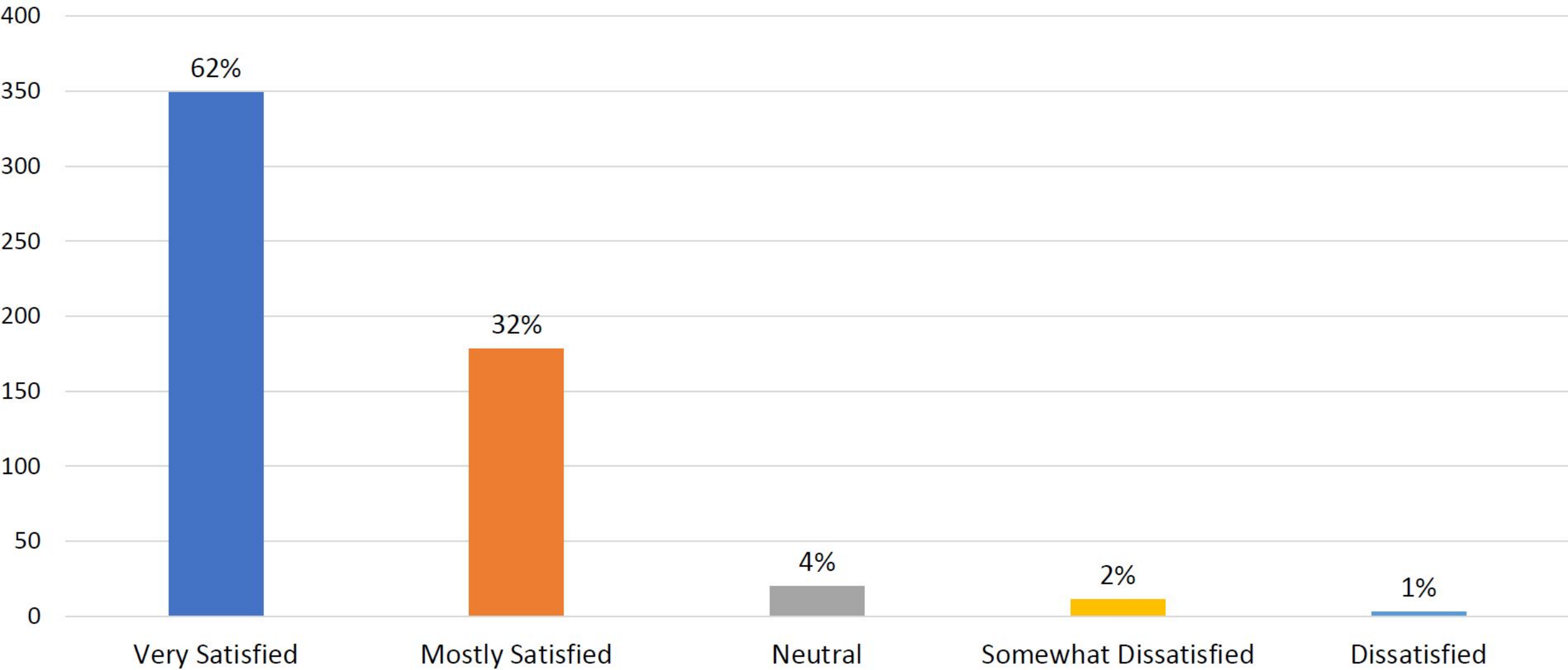
All-Member
Survey Recap

John Schuyler
2025-26 Council President

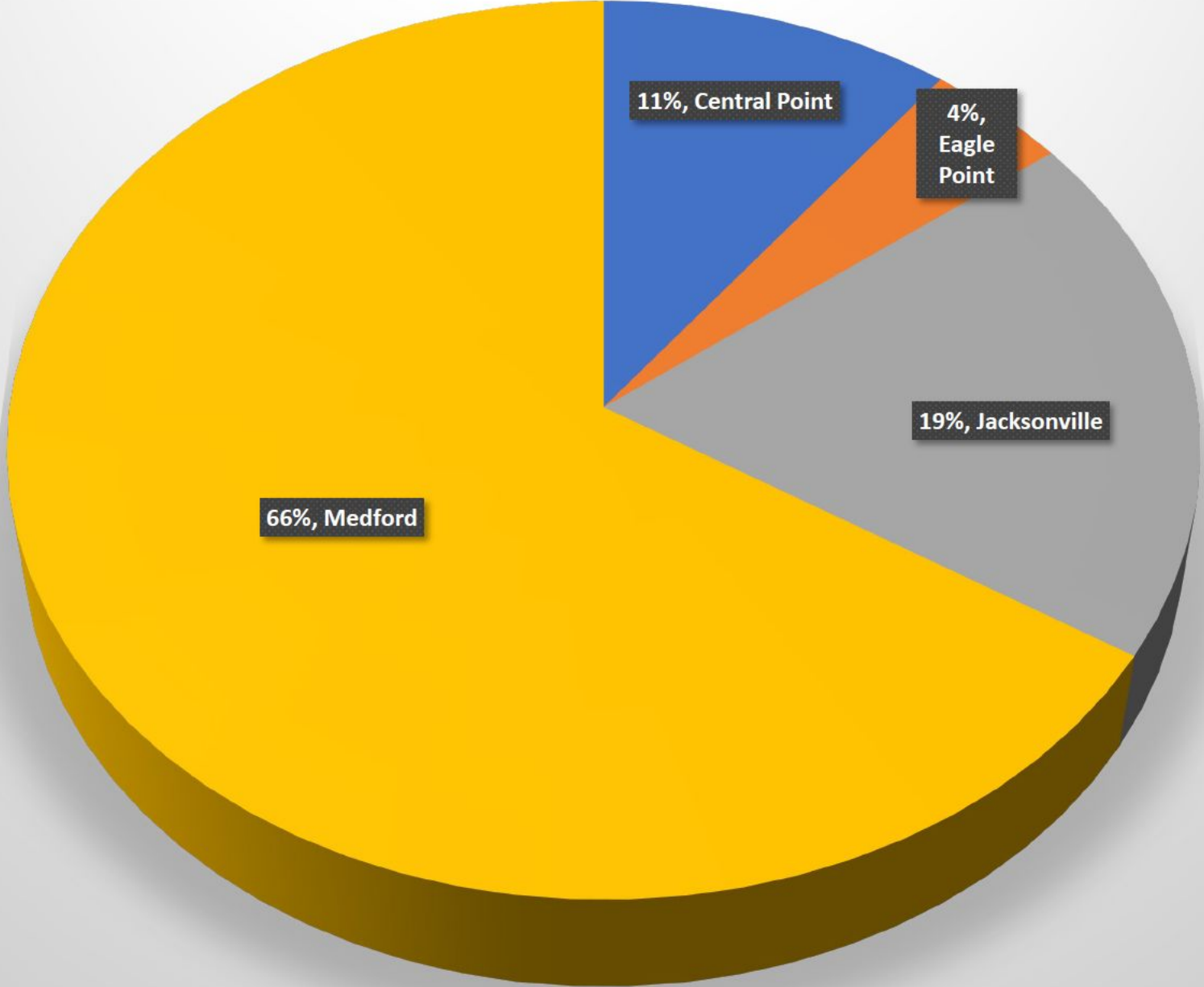
2026 Member Survey

- 570 responses = 29% of membership
- Length of membership, age, and geographic distribution similar to total membership

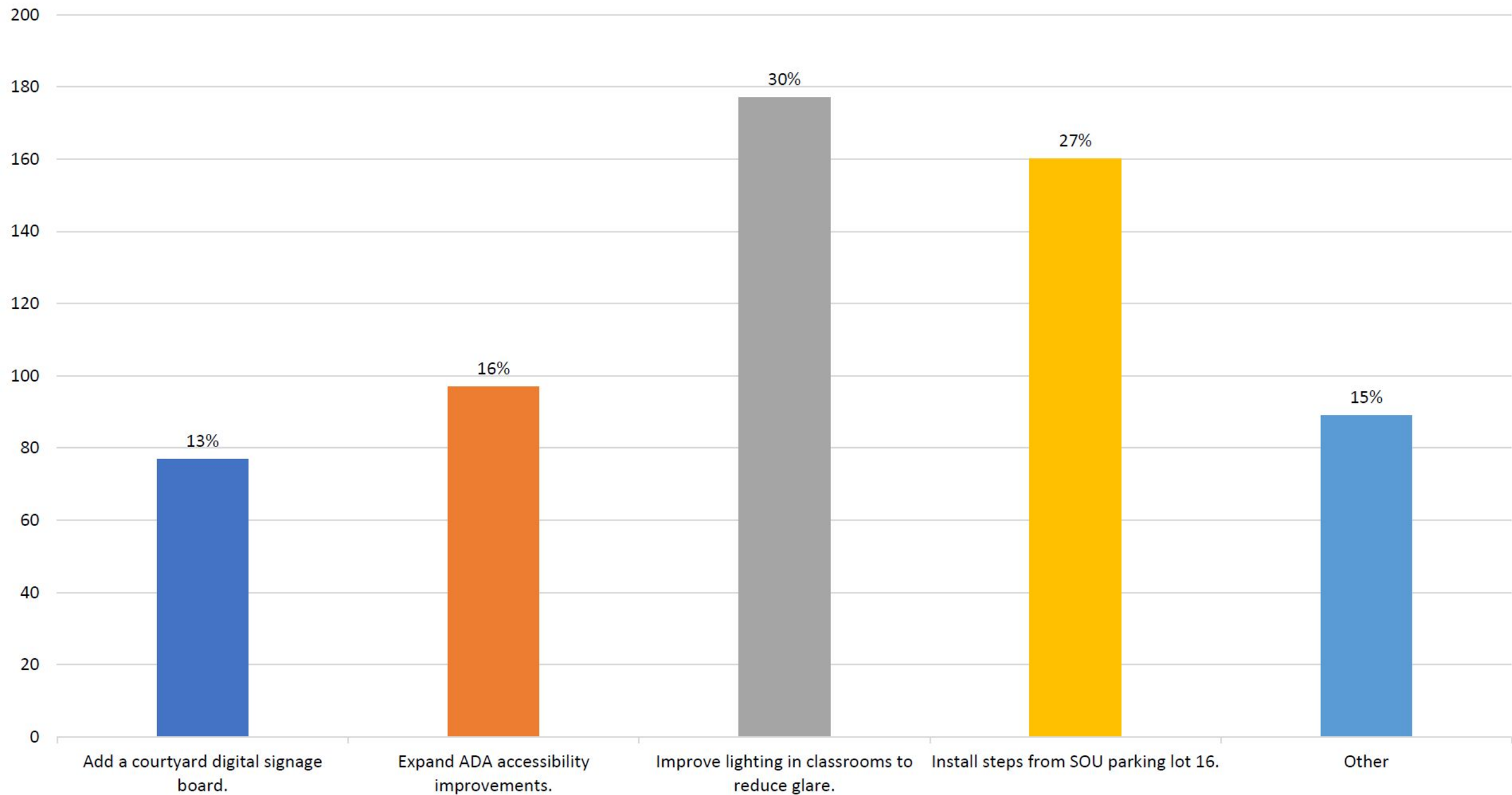
Thinking of your overall OLLI experience of this past academic year, please rate your overall satisfaction.



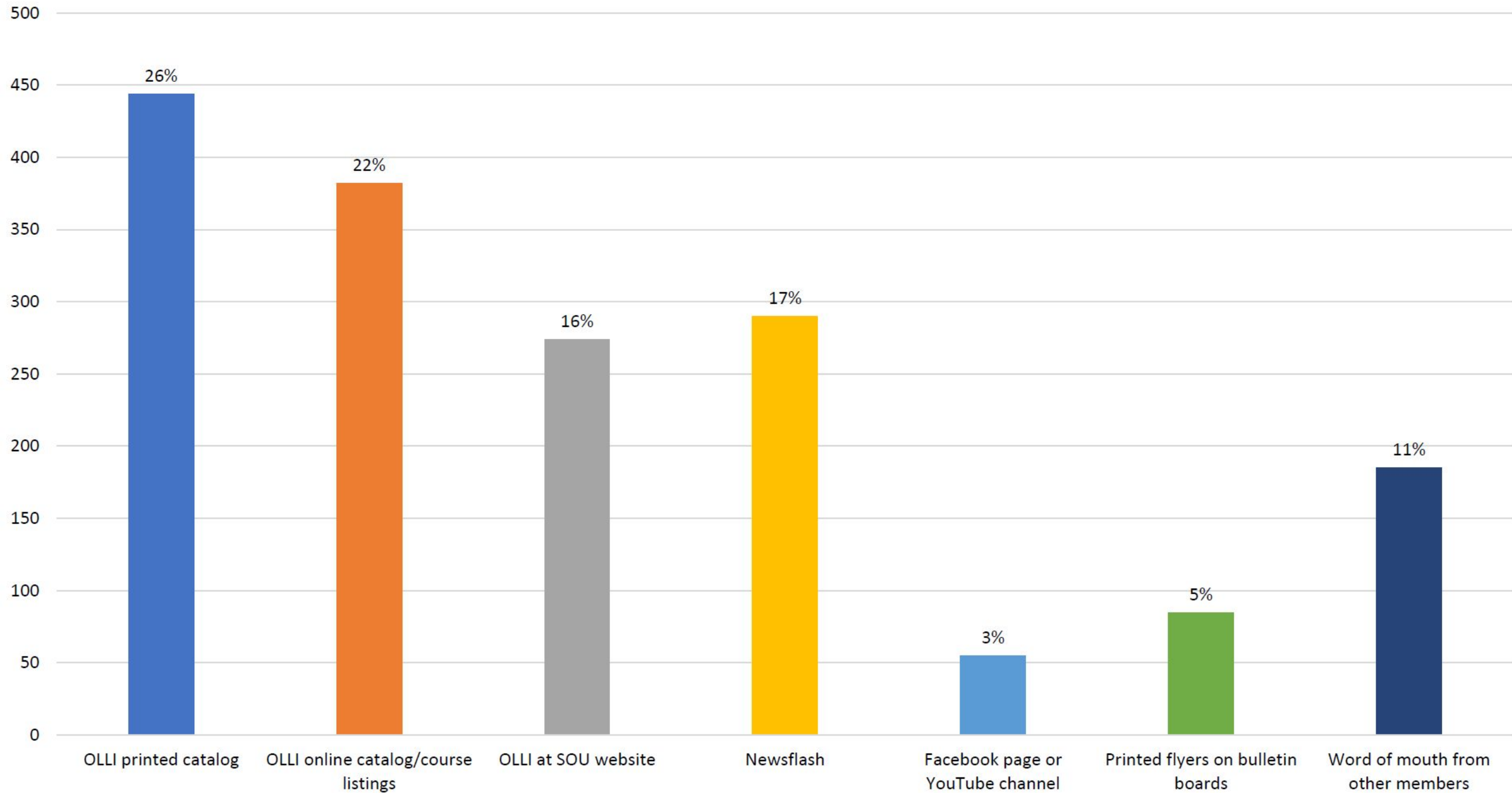
Which of the following locations would you prefer to attend if a course of interest were offered?



Which of the following capital improvements to the Campbell Center would you find beneficial?



How do you find out about what's happening at OLLI at SOU? (2 of 2)



A red speech bubble graphic with a white outline, containing the text "OLLI at SOU Staff".

OLLI at SOU
Staff

Heather Inghram,
Administrative Director

A red speech bubble graphic with a white outline, containing the text 'OLLI at SOU Support Staff'. The bubble has a tail pointing downwards and to the right.

OLLI at SOU Support Staff

- Linda Powell,
Administrative Assistant
- Megan Rutherford,
Administrative Specialist
- SOU IT Students Danielle,
Felicity, Jon, and Katherine

SOU Situation & OLLI at SOU

- OLLI at SOU is self-sustaining program of SOU and an affiliate of the SOU Foundation.
- OLLI's three revenue sources are:
 - Revenue from the membership fee
 - Contributions to our annual fund
 - Annual distributions from the Osher Endowment

SOU Situation & OLLI at SOU

- OLLI receives several services from SOU and pays the university for the following:
 - Monthly rent for the SOU Campbell Center
 - Parking in Lot 16
 - IT and network services infrastructure
 - IT student support
 - Expertise provided by SOU's accounting, facilities, finance, and HR personnel
- OLLI at SOU is not going anywhere, but the university support and program staff may be impacted.

More Information on the SOU Website

SOU Governance: governance.sou.edu

SOU Vitality Plan:
sou.edu/president/path-to-fiscal-sustainability

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OLLI
Leadership
Transition

Sarah Tisch, OLLI Vice
President / President-Elect



Current
OLLI at SOU
Council

We are grateful to our current Council Directors:

- Colet Allen
- Tony Davis
- Mary Devlin
- Fernando Gapasin
- Myrna Hall – outgoing Treasurer
- Ann Magill – outgoing Secretary
- John Schuyler - outgoing President
- Tom Woosnam

Thank You to
our Committees
and Teams!

OLLI at SOU has eight standing committees and three work teams— this is where the work of OLLI gets done.

- Communications (Fernando Gapasin)
- Curriculum - Ginny Blankinship, Anne Coleman
- Events - MaryBeth Limpert
- Finance - Myrna Hall
- Fundraising - Dwight Wilson
- Garden - Ruth Sloan
- Membership (Colet Allen, Cathy Prazenica)
- Programs and Activities - Karla Langland
- Travel Pilot Project - Myrna Hall and Rebecca Jurta
- Venue and Technology - Lorraine Vail

A red speech bubble graphic with a white outline, containing the text 'Outgoing Leadership'. The bubble has a tail pointing downwards and to the right.

Outgoing Leadership

Thank you to our outgoing directors!

- Colet Allen, Membership Committee Liaison
- Ann Magill, Council Secretary
- Mary Devlin, Fundraising Committee Liaison

Welcome
Incoming
Leadership

Class of 2029 Council Directors

- Anne Hartridge
- Susan Plass
- Kevin Talbert

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Member Questions & Comments

Closing Remarks

Join us at the Independence Day Parade in July and/or
the OLLI Open House in August!

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Thank You!

Meeting adjourned.
Please stay seated for
our entertainment.

**Cheryl
Goodman -
Morris**

**Writer and Director of
“OLLI OLLI, Oxen Free!”**



**Ice Cream
Social!**

