



# Research Report

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## Executive Summary

This study was conducted on behalf of the Osher Lifelong Learning Institute at the University of South Florida. Its purpose was to gauge the awareness, attitudes and behaviors of senior residents in Hillsborough County and to determine problems and possible solutions to cultural diversity and development issues.

Implemented in September 2007, the study consisted of qualitative and quantitative measures, which began with field research at OLLI-USF's Open House. A survey of local seniors was conducted over a two week period. This was originally meant to be a telephone survey. However, due to time constraints and low response rates, our survey method was changed to a convenience survey. The survey consisted of interval, ratio and nominal measurements. The most significant findings from this survey include:

- Seniors are not familiar at all (n=73, m=1.49) with the Osher Lifelong Learning Institute.
- Time was the most important factor (n=72, m=4.04) in seniors' decisions to join an adult learning program.
- Course offerings were the most valuable (n=73, m=4.07) in seniors' decisions to join an adult learning program.

In-depth interviews were conducted with two influential individuals from OLLI-USF, Joseph McAuliffe and Ron Hurst. These interviews gave insight into important development and diversity issues that OLLI-USF is facing.

The first person interviewed was Joseph McAuliffe, a program coordinator at OLLI-USF. This interview touched on issues regarding cultural diversity, development and the importance of adult learning programs. Significant findings from this interview include:

- OLLI-USF basically has no development plan right now and a development committee has recently been established to create a strategic program to be implemented.
- Diversity is important to OLLI-USF and Joseph attributes the lack of diversity to the fact that the senior population has an overwhelming percentage of Caucasians that are more educated.

Ron Hurst, founder of OLLI-USF's development committee and Chairman of the Board for LIR (Learning in Retirement), was interviewed regarding development efforts, specifically on soliciting donors and improving development strategies. Significant findings from this interview include:

- Hurst stated that he considered the marketing efforts, or lack thereof, to both members and potential donors to be OLLI-USF's greatest weakness.
- Hurst claims that many potential donors exist; however, they are unable to be reached because OLLI-USF cannot interfere with the university's efforts to raise money.

A focus group of OLLI-USF's culturally diverse members was conducted to obtain opinions and recommendations concerning the organization's diversity issues. The seven participants were hand-selected by the program director representing a variety of culturally diverse backgrounds.

The significant findings from the focus group include:

- When referring to the age group of the majority of membership at OLLI-USF, the focus group participants agreed unanimously on using the term senior citizen.
- Many of the participants did not see a problem with the lack of diversity at OLLI-USF. Many said they simply arrive and teach or arrive and learn, regardless what type of person is there.

- By adding a more culturally diverse group of instructors, minority membership might increase.

Both business and individual donor questionnaires were conducted to gather information about the donation process including how they were approached, their reason for donating and the solicitation material provided. Of the attempted 10 donors from a list provided by OLLI-USF, 5 were completed. The significant findings from these questionnaires include:

- Business donors cited helping an educational organization, company advertising, and exposure as benefits of contributing to OLLI-USF.
- Business donors indicated that OLLI-USF's affiliation with USF favorably effects their decision to donate.
- Respondents identified a simple and quite informal process when donating to OLLI-USF. All of the respondents were approached in person about donating, mainly by Hurst, and felt they were adequately informed about the use of their donation.

## **Situation Analysis**

### **Problem Statement**

The Osher Lifelong Learning Institute at the University of South Florida (OLLI-USF) lacks a clear identity and image among its external publics, which is significantly impeding its developmental efforts and inhibiting enrollment among minority groups.

### **About OLLI-USF**

The OLLI-USF is a learning community of older adults that fosters intellectual stimulation, physical activity, and social engagement through a variety of educational programs. It is one of five OLLI programs in Florida and one of 115 in the nation.

OLLI-USF is a part of the Division of Continuing Education and Educational Outreach at USF. The program was previously known as the USF Division of Senior Programs, which included SeniorNet Tampa (established 1993) and Learning in Retirement (established 1994).

In February of 2005, OLLI-USF received a grant from the Bernard Osher Foundation, which helps fund a national network of lifelong learning institutes. The Bernard Osher Foundation, founded in 1977 by Bernard Osher, established the Osher Lifelong Learning Institute to provide learning opportunities for older adults. One condition of the grant is that each institute be identified by a common name, which is why the name changed from the USF Division of Senior Programs to OLLI-USF.

OLLI-USF is a member-run and -led organization, and the programs and workshops are designed to provide members with continuing education opportunities to create an active community of learners. Membership is \$30 and is effective September 1 – August 31. Membership benefits include volunteer opportunities, Lunch and Learn programs, day trips, and Learning in Retirement (LIR) study groups and lectures.

The OLLI-USF staff serves as the liaison between the university and the program. They work with and recruit members, leaders and volunteers to administer and coordinate programs. The program director is Ara Rogers, who is assisted by program coordinators Joseph McAuliffe, Heidi

Bauer and Andrea Walsh. OLLI-USF is located at The University of South Florida, 4202 East Fowler Avenue NEC116 Tampa, FL 33620.

### **Existing Research**

The administration at OLLI-USF is dedicated to the needs of their members. In order to best understand and serve members, OLLI-USF staff conducted a member survey in the spring of 2007. The survey was conducted through e-mail, generating 294 respondents, about 33% of total membership.

Some key findings included:

- 34% of members are between the ages of 66 and 74.
- 92.8% of members self-report as white/Caucasian.
- 48% of respondents said that “other interests and activities” prevent them from taking more classes.
- 61% of respondents thought that program costs were the least important consideration in joining OLLI-USF.
- 88% of respondents rated their satisfaction level with the program at 8 out of 10.

## **Methodology**

This study was conducted on behalf of the Osher Lifelong Learning Institute at the University of South Florida. Its purpose was to gauge the awareness, attitudes and behaviors of senior residents in Hillsborough County towards OLLI-USF and to determine problems and possible solutions to cultural diversity and development issues.

Based on the wide range of challenges facing OLLI-USF, such as cultural diversity and development, a variety of research methods were used including a telephone survey, focus group, in-depth interviews, questionnaires and field research.

A telephone survey of local seniors in Hillsborough County was chosen as the best method because it would be the most successful way to reach this age group and to produce generalizable results. The purpose of this survey was to gauge the awareness, attitudes and behaviors of seniors concerning OLLI-USF and other adult learning programs.

A list of Hillsborough County registered voters, ages 55 and over, was obtained from the Supervisor of Elections office and was used to draw a random sample of the population. Telephone calls were made during the week of October 15. Due to time constraints and a very low response rate, the instrument was converted into a convenience survey. Between October 22 and October 29, convenience surveys were conducted at public locations such as the University Mall, the Temple Terrace Public Library and the Brandon Mall.

The participants were asked to give responses to interval, nominal and ratio level questions concerning their knowledge and familiarity of OLLI-USF, factors affecting their decision to join an adult learning program, their level of agreement with statements regarding behaviors and attitudes towards adult learning programs and demographics.

The questions that were on a Likert-type scale include:

1. On a scale from 1 to 5, where 1=Not Familiar at all and 5=Very Familiar, how familiar are you with the Osher Lifelong Learning Institute?

1      2      3      4      5

2. On a scale from 1 to 5, where 1=Not Knowledgeable and 5=Very Knowledgeable at all, how knowledgeable are you about the purpose of adult learning programs?

1      2      3      4      5

3. On a scale from 1 to 5, where 1= Not Familiar and 5= Very Familiar, how familiar are you with other adult learning programs?

1      2      3      4      5

4. Please tell me how important each of the following is in your decision to join an adult learning community on a scale of 1 to 5, with 1 being Not Important, 3 being No Opinion, and 5 being Most Important, please tell me what your biggest concern about joining an adult learning program is:

\_\_\_\_\_ How important is **Time**?  
\_\_\_\_\_ How important is **Money**?  
\_\_\_\_\_ How important is **Transportation**?  
\_\_\_\_\_ How important is **Location**?

5. Please rate the following on a scale of 1 to 5, with 5 being the most important. How valuable are the following in your decision to join an adult learning program?

\_\_\_\_\_ How valuable are **Course Offerings** in your decision to join?  
\_\_\_\_\_ How valuable is the **Quality** of instructors in your decision to join?  
\_\_\_\_\_ How valuable are the **Social opportunities** in your decision to join?  
\_\_\_\_\_ How valuable are the **Volunteer opportunities** in your decision to join?  
\_\_\_\_\_ How valuable are **Day trips and other activities** in your decision to join?

6. I am currently a member of an adult learning program.

1      2      3      4      5

7. I currently volunteer in the Tampa community.

1      2      3      4      5

8. I would be interested in volunteering at OLLI-USF.

1      2      3      4      5

9. Adult learning is important to me.

1      2      3      4      5

10. I believe that information about adult learning programs is easily accessible.

1      2      3      4      5

11. I have family or friends who are involved in these programs.

1      2      3      4      5

12. I am active in the Tampa community.

1      2      3      4      5

13. Diversity is important in my choice of organizations to join.

1      2      3      4      5

Nominal level questions include:

14. Sex

- Male
- Female

15. Which of these best describes your racial/ethnic background?

- Asian
- Black/African American
- White/Caucasian
- Hispanic
- Native American/American Indian
- Other. Please specify: \_\_\_\_\_

16. Education level

- High school diploma
- Bachelor's degree
- Graduate degree

17. Do you consider yourself retired? \_\_\_\_\_ Yes (1) No (2)

18. Do you live in Florida year-round? \_\_\_\_\_ Yes (1) No (2)

19. What term do you prefer when referencing your age group?

- \_\_\_\_\_ Older Adult
- \_\_\_\_\_ Mature Adult
- \_\_\_\_\_ Retiree
- \_\_\_\_\_ Senior Citizen
- \_\_\_\_\_ Other: \_\_\_\_\_

Ratio level questions include:

20. Age \_\_\_\_\_

A focus group of culturally diverse OLLI-USF members took place on October 25, 2007. The 7 participants were hand-selected by the program director and represented many culturally diverse backgrounds, including a Japanese American, two Caucasian Americans, and individuals from Egypt, Great Britain, India, and France. The group included three women and four men. This qualitative method was chosen to obtain opinions and suggestions from these members concerning the lack of diversity at OLLI-USF. Participants were informed about the focus group through e-mail with a pre-notification letter, a focus group invitation and a reminder sent to potential participants. The focus group took place in the OLLI-USF conference room at 12 p.m.

The in-depth interviews were conducted during the week of October 15. The director of OLLI-USF contacted pointed out Joseph McAuliffe and Ron Hurst as leaders within the organization that would provide insight into two of OLLI-USF's biggest problems, diversity and development. These are two complex areas and this method provided the most in-depth and detailed information.

Field research was conducted to develop a better understanding of how OLLI-USF functions. By attending the Open House on September 12, 2007, one team member was able to meet key people within the organization and understand more about the organization is run. On October 19, 2007, a team member attended Great Conversations Through Great Literature and observed Patrick DeMarco lead the study group.

In order to assist OLLI-USF in their developmental efforts, a donor questionnaire was created. OLLI-USF provided a list of business and individual donors and questions sought to gather information about the donation process including how they were approached, their reason for donating and the solicitation material provided. Of the attempted 10 donors from a list provided by OLLI-USF, 5 were completed during the weeks of October 8 and October 15.

## **Qualitative Research Analysis**

Focus Group Analysis

Thursday, October 25, 2007 at 12 p.m.

7 Participants

Length: 1 hour, 8 min.

### **The Participants**

The purpose of the focus group was to get member insight and opinions on current diversity within OLLI-USF. The participants for the focus group were hand-selected by the program director because of their diverse backgrounds and cultural experiences.

The seven participants represented many culturally diverse backgrounds, including a Japanese American, two Caucasian Americans, and individuals from Egypt, Great Britain, India, and France. The group included three women and four men. There were no Hispanics or African Americans present. Similarly, these groups are the most under-represented groups at OLLI-USF, as revealed by a previous membership survey.

Some important points about the participants:

- All of the members were part of the program before it received a grant from the Osher Lifelong Learning Institute.
- One participant (P2) was an OLLI member in Illinois before joining OLLI-USF.
- A majority of the participants are/were OLLI-USF instructors and students.
- P4 was a “founding” member of the SeniorNet program.

### **OLLI-USF**

To begin questioning, the moderator asked about the name association of OLLI-USF. The consensus among focus group participants was that the term is vague considering the all-encompassing nature of the organization. OLLI-USF is an umbrella term for the pre-existing SeniorNet and LIR (Learning in Retirement) programs. Participants associated the term OLLI synonymously with the funding received by the Osher Foundation. Furthermore, participants felt that use of the university’s acronym (USF) in the organization’s name was positive.

From these findings, it is apparent that many members have not fully embraced OLLI-USF's re-branding efforts; however, the organization's association with the university should be emphasized during recruitment, branding, and publicity.

Important points about the name association:

- Many members still refer to OLLI-USF as SeniorNet and LIR (Learning in Retirement)
- Although there are issues with space, parking, and funding, OLLI members are proud of the association with USF.
- Essentially, OLLI-USF represents 'continuing education.'
- The various acronyms and multiple departments/programs used to refer to OLLI, both currently and in the past, are overwhelming and/or confusing to members.

### **Age Group**

When referring to the age of the majority of OLLI-USF membership, focus group participants agreed unanimously on using the term "senior citizen." "Elderly," already discovered in prior research and affirmed in the focus group, is not a preferred term.

Some participants suggested the use of some non-traditional terms for consideration in our campaign. These terms included; "senior students" (P6) and, as in France (not preferred in the states), "Third Age" (P7.)

Moving a bit deeper into the topic, a few participants clarified that not all OLLI-USF members are retirees and/or senior citizens. As it stands, 82.6% of the membership is retired from full-time work and only 2% of the membership is under 55 years of age. Although it is important to meet the needs of the larger majority, it is necessary to take these "non-senior" members into account.

### **Diversity**

When asked to explain the meaning of diversity, the subject immediately turned to OLLI-USF and membership diversity. One participant (P4) thought diversity meant having members of different ethnic cultures present. However, the ensuing discussion focused on ethnic diversity at OLLI-USF.

Members have differing opinions. Interestingly enough, P5 described a situation in which she felt personally discriminated against because of her ethnicity. She described her initial visits to OLLI-USF classes and programs as “uncomfortable.” This was an interesting point that would prove to be a predominant theme throughout the meeting. This same participant went on to express her frustration with the senior age group, in general, and its attitudes toward diversity. It is important to note that, even with a carefully crafted publicity campaign, this age group may be unwilling or disinterested in the idea of increasing ethnic diversity among members.

Later, two participants (P2 and P7) reinforce this point by saying that the drive for a more diverse membership should start from within. A solid campaign to increase diversity should come from within the organization. Furthermore, many participants did not see a problem with the lack of diversity at OLLI-USF. Many said they enjoy their time teaching or learning at OLLI-USF with little or no regard to the ethnic backgrounds of the people around them.

Although all of the participants agreed that diverse members are welcome and not discouraged from joining, they admitted that OLLI-USF has not adequately recruited minority groups yet. Based on their opinions, it seems that more ethnic diversity would benefit the program, but it is not currently viewed as a problem (except by OLLI-USF staff, who cited it as a concern).

Some participants shared their impressions of how minority students might feel at OLLI-USF. Some participants (P1, P3, and P7) have seen African American and Hispanic students in classes before, but not again since then.

The participants identified Hispanics and African Americans as the most underrepresented groups at OLLI-USF, in line with recent survey results. Throughout the conversation, the participants shared stereotypical views of how to target these groups and where to find them. While their recommendations are valid, a campaign to increase diversity should also serve to educate current OLLI-USF members about minority groups in an attempt to change negative attitudes and perceptions. For example, P7 suggests that the number one reason why minorities do not join OLLI is that “education is not a priority.” This is not true of every Hispanic culture, or any culture, for that matter. OLLI-USF members may have other misperceptions regarding

minorities, hindering the learning community's acceptance of such groups. It is also unclear how familiar the participants were with diversity in the local community based on several individuals' comments that OLLI-USF's demographic makeup is similar to that of the Tampa Bay Area.

Participants were asked to suggest ways in which to reach the targeted audience and revealed an interesting point. OLLI-USF instructors do not represent a diversity of ethnic backgrounds. By recruiting more culturally diverse instructors, minority membership might increase. Also, such instructors could offer a new perspective – benefiting current members, as well.

Some differences surfaced when the participants were prompted to discuss current recruitment efforts for minority members. Two participants (P3 and P4) said there had been multiple programs to lend assistance to low-income families and children in the area. However, there was no evidence that this was a recruitment effort or anything more than philanthropy on the part of OLLI-USF. Furthermore, P7 strongly disagreed with the fact that any of these programs were intended to attract minority members. As indicated by P4, information on these programs is available in OLLI-USF's history files.

The participants were also asked to talk about their biggest concern in regard to diversity in OLLI-USF. Some participants shared that this did not appear to be a problem and another suggested that possibly they are the problem, by way of not recognizing that OLLI-USF lacks cultural diversity. A program rooted in the community should reflect the cultures represented in the community and OLLI-USF does not.

Also, some final suggestions included recruiting bilingual instructors, reaching out to community centers, and implementing a long-term, solid diversification plan. This is not a one-dimensional problem, and it is evident that education and recruitment will need to start within the OLLI community.

Key reasons attributed to low minority membership (as is suggested by participants:)

- Education is not a priority
- Transportation

- Difficult classes
- Publicity (Need materials and somewhere to take them!)
- Difficult Economic Situation
- Uncomfortable feelings

#### Ideas and Suggestions for a Diversity Campaign:

- Campaign must be willing to educate and persuade current OLLI-USF members.
- Needs to come from within the organization; must be an internal initiative.
- Encourage trans-generational activities and interaction to “introduce” or “sell” the diversity idea to older adults.
- Sell OLLI-USF’s mission and program to community opinion leaders. (Major suggestions: church leaders and community center directors)
- Recruit ethnically diverse instructors and expand course offerings.

#### **In-depth Interviews**

The purpose of the in-depth interviews was to gauge key board members’ opinions and perspectives about the organization’s low minority enrollment numbers and the developmental challenges facing OLLI-USF. Their input will help identify possible solutions for improving enrollment among minority groups, as well as various strategies to increase the organization’s donor base.

For each interview, each person was asked a different set of questions targeted toward their area of knowledge about the program.

#### **Interview #1:**

##### **Joseph McAuliffe, OLLI-USF Program Coordinator**

The first person interviewed was OLLI-USF coordinator Joseph McAuliffe, who has worked in this capacity for more than five years. McAuliffe’s job includes coordinating the program’s classes and recruiting instructors, referred to as study group leaders. The organization is completely run by volunteers, so instructors give their time in exchange for the rewards of

teaching. Currently OLLI-USF offers about 70 classes to a record-breaking membership of over 1,000 members.

McAuliffe is also responsible for finding venues for classes. According to McAuliffe, 80% of the classes are now being held off campus due to issues with parking. McAuliffe finds these venues by forming partnerships with other local organizations and institutions throughout Hillsborough County. He tries to get venues with adequate parking facilities that can offer the space for free or a minimal charge. The program currently has 18 to 20 partnerships, which include the Jewish Community Center, The Tampa Women's Club, The University Village Retirement Community, John Knox Village, the Salvation Army and several churches.

OLLI-USF's membership fee is set at \$30 annually. The fee hasn't been changed since McAuliffe joined the program staff. The fee, although it may seem minimal, offers members several benefits such as taking classes during their four academic terms, borrowing privileges at the USF library, and the opportunity to attend special events, such as free Lunch and Learn programs. Also, up until early October, members received free parking permits from USF Parking and Transportation Services. According to McAuliffe, OLLI-USF's cost is relatively inexpensive compared to other OLLI programs. However, he sees this as a benefit to the USF program. For example, the OLLI at Eckerd, located in Pinellas County, is considerably higher. He believes that the low cost will eventually help them alleviate the organization's current diversity issues.

McAuliffe believes that the diversity problem can be attributed to the fact that the adult population has an overwhelming population of Caucasians that are more educated and as a result, dominate most adult learning programs. Still, OLLI-USF is committed to increasing ethnic diversity among its members. In order to increase diversity, McAuliffe believes that they need to make efforts to offer classes in diverse neighborhoods and meet with professional associations that cater to minorities.

In regard to development, McAuliffe says that OLLI-USF's fundraising efforts are practically nonexistent. Recently though, they have formed a development committee whose main purpose

is to develop a strategic program, which will encourage OLLI-USF members to donate. Currently, OLLI-USF has six or seven sponsors that provide funding to publish the Evergreen course catalog four times a year. Overall, OLLI-USF receives about \$10,000 in donations.

The OLLI-USF staff is always trying to improve the program. In order to keep their members satisfied and encourage further growth, they try to stay current on what other groups are doing. They also make an effort to keep members involved by conducting periodic surveys.

## **Interview #2:**

### **Ron Hurst, OLLI -USF Board Member**

Our second in-depth interview was conducted with Ron Hurst at the OLLI-USF office. The interview was held in the OLLI-USF conference room on Friday, October 26, 2007 at 11 a.m. Hurst has been an active member of OLLI-USF for seven years and is currently the chairman of the board for Learning in Retirement. In addition, he is the founder of the newly created development committee, which serves as a venue to create fundraising initiatives for the organization. This interview solicited his perspective on OLLI-USF's past and current development efforts, new fundraising strategies, and related challenges facing the organization. Some interesting points made by Hurst are the following:

Hurst has recruited all the OLLI-USF donors featured in *Evergreen*. He has tried to push other board members to solicit donations, but feels they are apprehensive to ask for money. Hurst has found that asking members in his local Rotary Club to donate has proven to be quite successful and says that one donation inevitably leads to another one very quickly.

"I've been involved in fundraising in many ways most of my life and I have no problem asking people to contribute," Hurst said. "But some people apparently don't like to do that. But every one of those supporters on *Evergreen*, I brought in."

Because the organization is tied to the university, it is difficult to secure certain donations. While at a national OLLI conference in San Jose, California, Hurst discovered that other OLLI's around the country were receiving half of their total budget from outside and OLLI-USF was receiving zero dollars outside the university. Thus, he pushed for the creation of the development

committee, which he notes is "kind of getting its feet off the ground," and that he is "not happy with delays." Hurst claims that many potential donors exist. However, they are unable to be reached because OLLI-USF cannot interfere with the university's efforts to raise money.

"The development committee should be able to do more than has been done in the past, but we have to move within our set of boundaries," he said.

In some cases, Hurst has been waiting for six months to receive permission to ask for donations from potential donors he feels would be interested in contributing.

"I've been sitting for six months on some of the people I mentioned to you who I know from the Board at Moffitt, who have never heard of this place (OLLI-USF)," he said. "And I'm sure if I told them about it, I'd get money from them. But I've been told to hold back."

Hurst stated that he considered the marketing efforts, or lack thereof, to both members and potential donors to be OLLI-USF's greatest weakness. Hurst said that a specific position for marketing currently exists, but he feels that there is little being done for the organization.

"I have not been happy with the efforts," Hurst said. "She tries, but to me, she just doesn't understand marketing. She just doesn't seem to understand what's out there and how to get to what's out there."

With regards to the effectiveness of membership communication efforts, Hurst believes that the organization is advancing. Each year the board goes on a retreat and the most widely discussed issue is communication with OLLI-USF members.

"We've talked about a newsletter, we've talked about this and that, but nothing's happened," he said. "It could be done better and probably through a newsletter. Something needs to be done to improve the communication. I think that is something that needs attention."

Hurst identified OLLI-USF's unique selling point to be the fact that classes are now being offered off-campus.

"The problem with fighting for a parking space is not as big of an issue with off campus classes," he said. "When I was in San Jose for the OLLI conference, the parking problem was not unique to USF. The parking problem was a problem at all the major universities that are growing."

Awareness, Hurst believes, is the single most important problem facing OLLI-USF in terms of development. Within the next few years, OLLI-USF is eventually going to have to move off campus.

"We've been told that within a few years we're going to have to be off campus," Hurst said. "And so, that's another reason why I'm more interested in a development committee because I suspect that there's somebody around that wouldn't mind having a building named after them. 'John Smith's Learning in Retirement Building at USF.' They can have it for a mere \$5 million. Public awareness is one of the greater shortcomings."

### **Field Research**

In order to better understand how the organization functions as a whole, one team member attended the OLLI-USF Open House as well as a course, Great Conversations Through Great Literature.

### **North Tampa Open House**

Wednesday, Sept. 12, 2007

Dr. Blaise F. Alfano Conference and Banquet Center

OLLI-USF holds two open house events each semester to provide current and prospective members with an opportunity to learn more about the programs, meet instructors and experience what makes this adult learning community different from the rest. Approximately 50 to 60 seniors attended the event and the mood was casual and upbeat. There was a clear sense of community and camaraderie among the members, akin to a close circle of friends. The instructors sat at booths to distribute handouts describing their class curriculum and discuss the course with interested students.

After a short breakfast reception, the OLLI-USF staff conducted a short presentation on the organization and the fall semester's course offerings. Next, they gave each of the instructors an

opportunity to address the group and “sell” members on the benefits of taking their class. Interestingly, there seemed to be a friendly competition among the instructors to attract the most students to their classes, so the presentations often sounded like a lighthearted sales pitch. OLLI-USF Program Coordinator Joseph McAuliffe reiterated the benefits of OLLI membership several times before turning the group’s attention to the featured guest speaker, USF Director of Community Relations and Student Ombudsman Les Miller.

OLLI-USF Director Ara Rogers claimed that attendance at this open house was lower than the first, which had taken place the week before on Friday, Sept. 7, 2007. However, the warm atmosphere reflected the organization’s strong sense of community and the members’ genuine enthusiasm for lifelong learning.

### **Great Conversations Through Great Literature (Great Books Study Group)**

OLLI-USF Study Group

Friday, Oct. 19, 2007

USF NEC 107

Study Group Leader: Patrick DeMarco

During this class, Study Group Leader Patrick DeMarco led a group of 10-12 senior students in a discussion of an assigned reading. Each student came prepared, having read the assigned pages, with an answer to a predetermined focus question. The two hour class period was spent sharing and discussing the students’ individual answers to the focus question and general opinions regarding the story. For this class session, the group used Rudyard Kipling’s *The Man Who Would Be King*.

For the most part, the group discussion was pleasant and spirited, but there were several instances when certain students became quite passionate when presenting or challenging arguments. Overall, the instructor’s guidance helped create a positive learning environment and stimulated energetic interaction among the students.

## **Donor Questionnaire Analysis**

To help determine the state of OLLI-USF's development individual and business donors were interviewed to gather information on their donor experience. An exhaustive list of 10 donors was acquired from the OLLI-USF director, Ara Rogers.

The donor questionnaire, completed by 5 donors, included ratio type questions about their background with OLLI-USF, their donor experience, and opinions and recommendations about development.

Of the five respondents, four first heard of OLLI-USF through a personal or organizational association with Ron Hurst, founder of OLLI-USF's development committee and Chairman of the Board for LIR (Learning in Retirement.) Hurst has a local influence through his memberships in multiple organizations in the Tampa Bay area. Through the interviews, it is clear that Hurst is OLLI-USF's primary source for recruiting donors.

All of the individual donor respondents were members of OLLI-USF at the time of their donation. The membership at OLLI-USF can be considered another primary source of donors.

When deciding to donate to OLLI-USF, individual donors identified organizational budget cuts and visible loss of funds by OLLI-USF as an incentive to donate. For example, one respondent noted that while instructing a course at OLLI-USF the use of hand-outs and printed materials was threatened due to high costs. The respondent decided to donate the funds for printing and publication needs. Following the initial donation of printing costs, that individual became an annual donor to OLLI-USF.

The donor experience was very similar across the board. Respondents identified a simple and quite informal process when donating to OLLI-USF. All of the respondents were approached in person about donating, mainly by Hurst, and felt they were adequately informed about the use of their donation. In general, respondents did not receive any materials following their donation; two donors mentioned receiving a copy of Evergreen, OLLI-USF's newsletter and course outline distributed four times a year.

Many of the respondents have a vested interest in the organization as members; however, the business donors cited helping an educational organization, company advertising, and exposure as benefits of contributing to OLLI-USF. Also, business donors indicated that OLLI-USF's affiliation with USF favorably effects their decision to donate.

All but one respondent reported donating to OLLI-USF on more than once and answered favorably when asked if they would donate again in the future. One respondent noted the best time for donating is January/February, after taxes, while another respondent specified November/December as the preferred time to donate. The other donors did not indicate a specific time they prefer to donate.

One respondent shared a story of his contributions to OLLI-USF. This individual challenged his OLLI-USF students to donate to the organization and promised he would match their donation. This is an interesting tactic that could be applied on a grand scale, posing the challenge to all of OLLI-USF's members and securing a corporation to match the funds.

When respondents were asked what types of local businesses might donate to OLLI-USF, they share; businesses selling or marketing to older adults, insurance companies, financial institutions, and people involved with the program already.

Overall, respondents were pleased with their donor experience. It is clear that most donors appreciate the social connection that is created when donating to OLLI-USF. Currently, members and businesses who donate to OLLI-USF respond to a personal touch and emotional appeal.

## **Qualitative Limitations**

### Donor Questionnaire

- Some corporate/business donors did not designate a contact to approach for the donor survey.

### Focus Group

- OLLI-USF staff personally selected participants, introducing an element of bias.

- Due to the subjective nature of qualitative research, the data gathered through these methods cannot be generalized to the entire population.

## Quantitative Research Analysis

### Descriptive Statistics

	<b>N</b>	<b>Minimum</b>	<b>Maximum</b>	<b>Mean</b>	<b>Std. Deviation</b>
How familiar are you with the Osher Lifelong Learning Institute? Q1	73	1	5	1.49	.945
How knowledgeable are you about the purpose of adult learning programs?Q2	73	1	5	3.18	1.183
How familiar are you with other adult learning programs? Q3	73	1	5	2.44	1.155
How important is Time? Q4	72	1	5	4.04	1.204
How important is Money? Q5	72	1	5	3.88	1.299
How important is Transportation? Q6	72	1	5	2.63	1.587
How important is Location? Q7	73	1	5	3.51	1.335
How valuable are Course Offerings in your decision to join? Q8	73	1	5	4.07	1.251
How valuable is the Quality of instructors in your decision to join? Q9	72	1	5	3.85	1.183
How valuable are the Social opportunities in your decision to join? Q10	72	1	5	2.89	1.170
How valuable are the Volunteer opportunities in your decision to join? Q11	72	1	5	2.56	1.331
	<b>N</b>	<b>Minimum</b>	<b>Maximum</b>	<b>Mean</b>	<b>Std. Deviation</b>

How valuable are Day trips and other activities in your decision to join? Q12	72	1	5	2.39	1.506
I am currently a member of an adult learning program. Q13	73	1	5	2.12	1.201
I currently volunteer in the Tampa community. Q14	73	1	5	2.97	1.536
I would be interested in volunteering at OLLI-USF. Q15	57	1	5	2.39	1.306
Adult learning is important to me. Q16	67	1	5	3.45	1.210
I believe that information about adult learning programs is easily accessible. Q17	73	1	5	2.68	1.189
I have family or friends who are involved in these programs. Q18	70	1	5	2.20	1.187
I am active in the Tampa community. Q19	73	1	5	3.08	1.479
Diversity is important in my choice of organizations to join. Q20	73	1	5	3.15	1.478
Age Q24	68	50	84	63.43	8.172
Valid N (listwise)	54				

The previous table details survey responses to 20 Likert-type scale statements and one ratio level measurement. The first column contains the survey question, followed by the number of respondents for that particular item (n), the mean and the standard deviation. These items were designed to gather information on local seniors' awareness, attitudes and behaviors regarding adult learning and OLLI-USF.

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The following Likert-type scale statements asked respondents to rate their familiarity with OLLI-USF and other adult learning programs on a scale from 1 to 5, where 1 = Not Familiar At All and 5 = Very Familiar.

- **How familiar are you with the Osher Lifelong Learning Institute? (Q1)**

Of 73 seniors, 73 responded to this item. The total mean response was 1.49.

- **How familiar are you with other adult learning programs? (Q3)**

Of 73 seniors, 73 responded to this item. The total mean response was 2.44.

The following Likert-type scale statement asked respondents to rate their knowledge of the purpose of adult learning programs on a scale from 1 to 5, where 1 = Not Knowledgeable and 5 = Very Knowledgeable.

- **How knowledgeable are you about the purpose of adult learning programs? (Q2)**

Of 73 seniors, 73 responded to this item. The total mean response was 3.18.

The following Likert-type scale statements asked respondents to rate the importance of various aspects of adult learning on a scale from 1 to 5, where 1 = Not Important, 3 = No Opinion and 5 = Most Important.

- **How important is Time? (Q4)**

Of 73 seniors, 72 responded to this item. The mean response was 4.04.

- **How important is Money? (Q5)**

Of 73 seniors, 72 responded to this item. The mean response was 3.88.

- **How important is Transportation? (Q6)**

Of 73 seniors, 72 responded to this item. The mean response was 2.63.

- **How important is Location? (Q7)**

Of 73 seniors, 73 responded to this item. The mean response was 3.51.

- **How valuable are Course Offerings in your decision to join? (Q8)**

Of 73 seniors, 73 responded to this item. The mean response was 4.07.

- **How valuable is the Quality of instructors in your decision to join? (Q9)**  
Of 73 seniors, 72 responded to this item. The mean response was 3.85.
- **How valuable are the Social opportunities in your decision to join? (Q10)**  
Of 73 seniors, 72 responded to this item. The mean response was 2.89.
- **How valuable are the Volunteer opportunities in your decision to join? (Q11)**  
Of 73 seniors, 72 responded to this item. The mean response was 2.56.
- **How valuable are Day trips and other activities in your decision to join? (Q12)**  
Of 73 seniors, 72 responded to this item. The mean response was 2.39.

The following Likert-type scale statements asked respondents to rate various statements on a scale from 1 to 5, where 1 = Strongly Disagree, 2 = Disagree, 3 = No Opinion, 4 = Agree and 5 = Strongly Agree.

- **I am currently a member of an adult learning program. (Q13)**  
Of 73 seniors, 73 responded to this item. The mean response was 2.12.
- **I currently volunteer in the Tampa community. (Q14)**  
Of 73 seniors, 73 responded to this item. The mean response was 2.97.
- **I would be interested in volunteering at OLLI-USF. (Q15)**  
Of 73 seniors, 57 responded to this item. The mean response was 2.39.
- **Adult learning is important to me. (Q16)**  
Of 73 seniors, 67 responded to this item. The mean response was 3.45.
- **I believe that information about adult learning programs is easily accessible. (Q17)**  
Of 73 seniors, 73 responded to this item. The mean response was 2.68.

- **I have family or friends who are involved in these programs. (Q18)**

Of 73 seniors, 70 responded to this item. The mean response was 2.20.

- **I am active in the Tampa community. (Q19)**

Of 73 seniors, 73 responded to this item. The mean response was 3.08.

- **Diversity is important in my choice of organizations to join. (Q20)**

Of 73 seniors, 73 responded to this item. The mean response was 3.15.

The following ratio level measurement asked respondents to indicate their age.

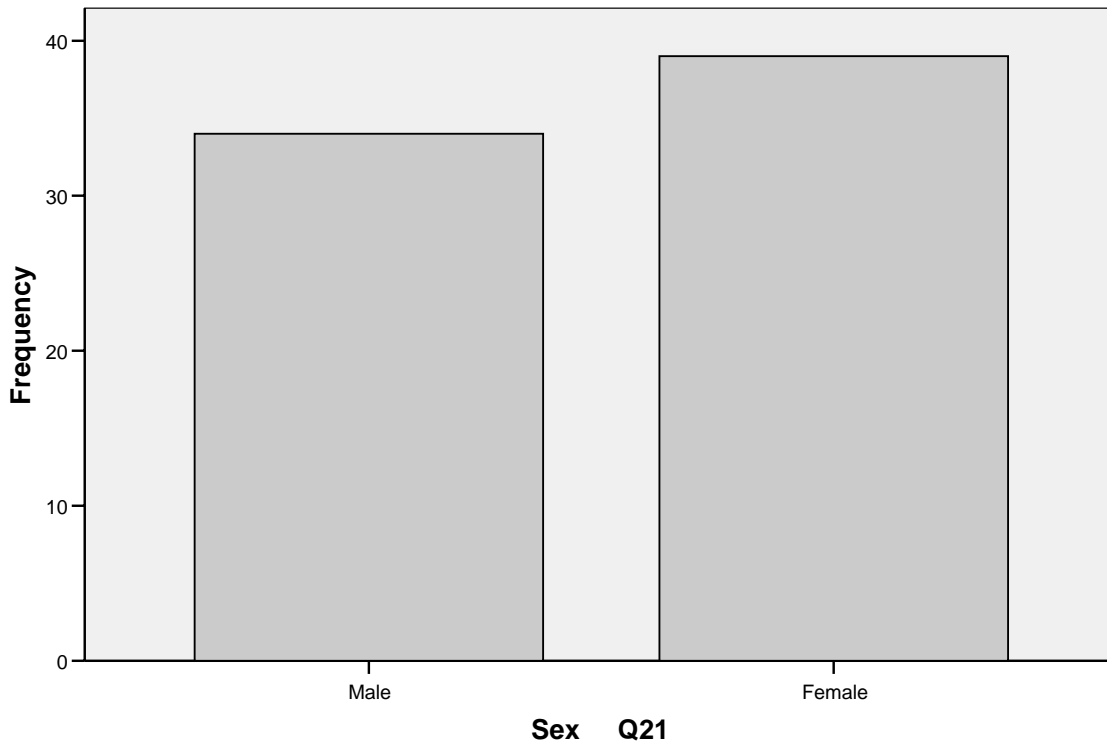
- **Age (Q24)**

Of 73 seniors, 68 provided their age. The minimum age was 50 and the maximum age was 84. The total mean response was 63.43 years old.

### Sex

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Male	34	46.6	46.6	46.6
Female	39	53.4	53.4	100.0
Total	73	100.0	100.0	

### Sex Q21

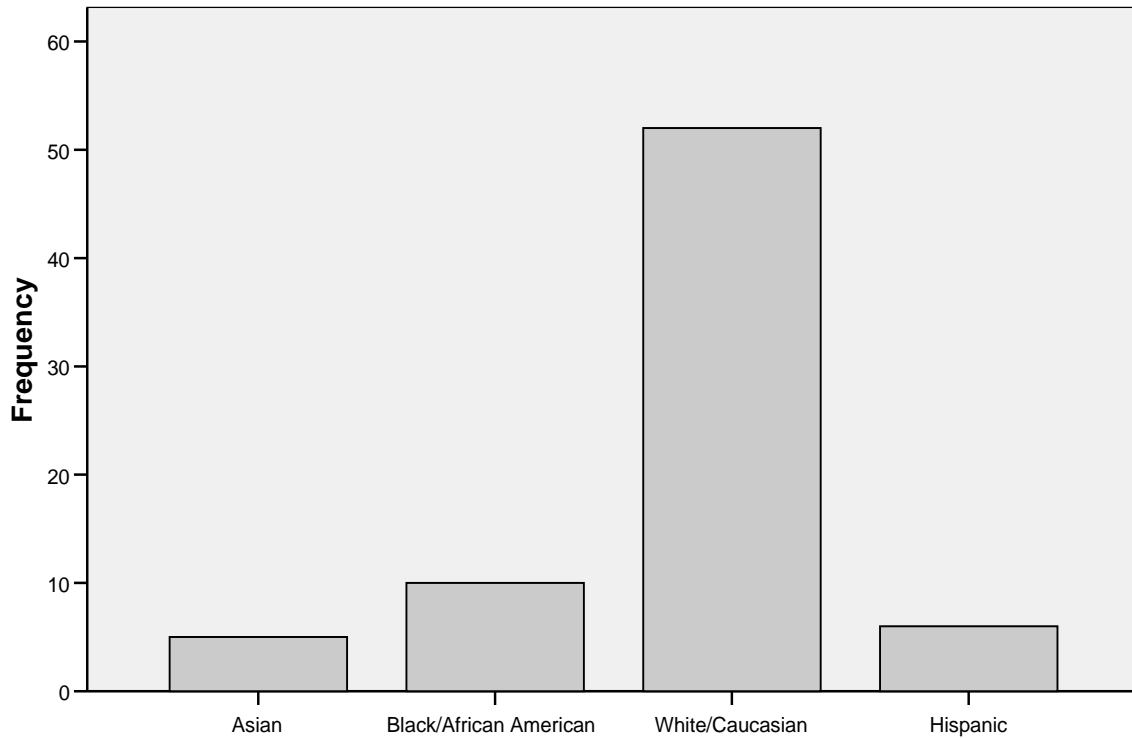


The survey sample consisted of 34 males (46.6%) and 39 females (53.4%) for a total of 73 respondents.

**Which of these best describes your racial/ethnic background?**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Asian	5	6.8	6.8	6.8
	Black/African American	10	13.7	13.7	20.5
	White/Caucasian	52	71.2	71.2	91.8
	Hispanic	6	8.2	8.2	100.0
	Total	73	100.0	100.0	

**Which of these best describes your racial/ethnic background? Q22**



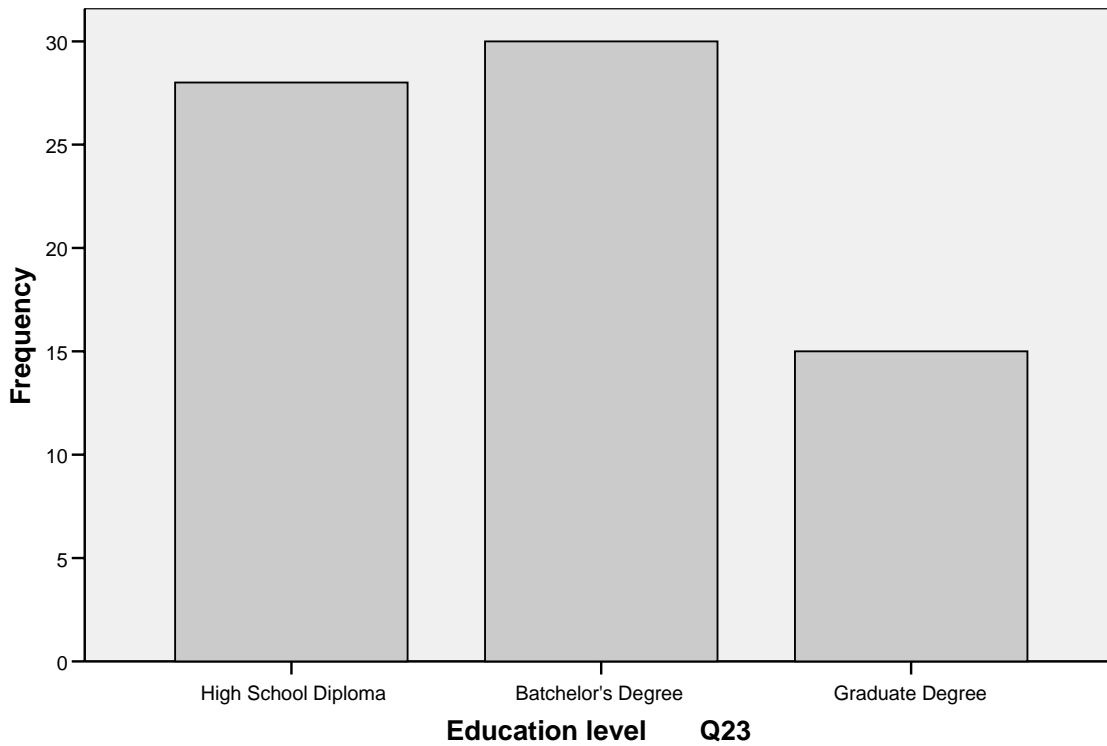
**Which of these best describes your racial/ethnic background? Q22**

The survey sample consisted of 5 Asians (6.8%), 10 Blacks/African Americans (13.7%), 52 Whites/Caucasians (71.2%) and 6 Hispanics (8.2%) for a total of 73 respondents.

### Education Level

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid High School Diploma	28	38.4	38.4	38.4
Bachelor's Degree	30	41.1	41.1	79.5
Graduate Degree	15	20.5	20.5	100.0
Total	73	100.0	100.0	

### Education level Q23

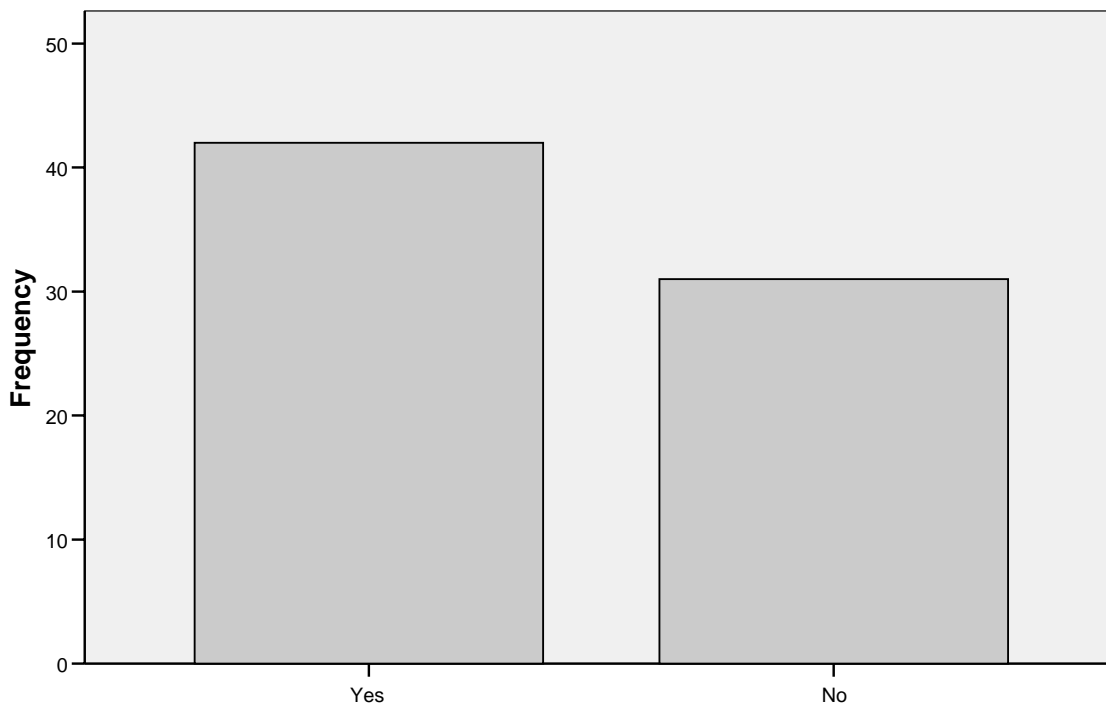


Of the 73 survey respondents, 28 have obtained a high school diploma (38.4%), 30 have obtained a bachelor's degree (41.1%) and 15 have obtained a graduate degree (20.5%).

### Do you consider yourself retired?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Yes	42	57.5	57.5	57.5
No	31	42.5	42.5	100.0
Total	73	100.0	100.0	

### 18. Do you consider yourself retired? Q25



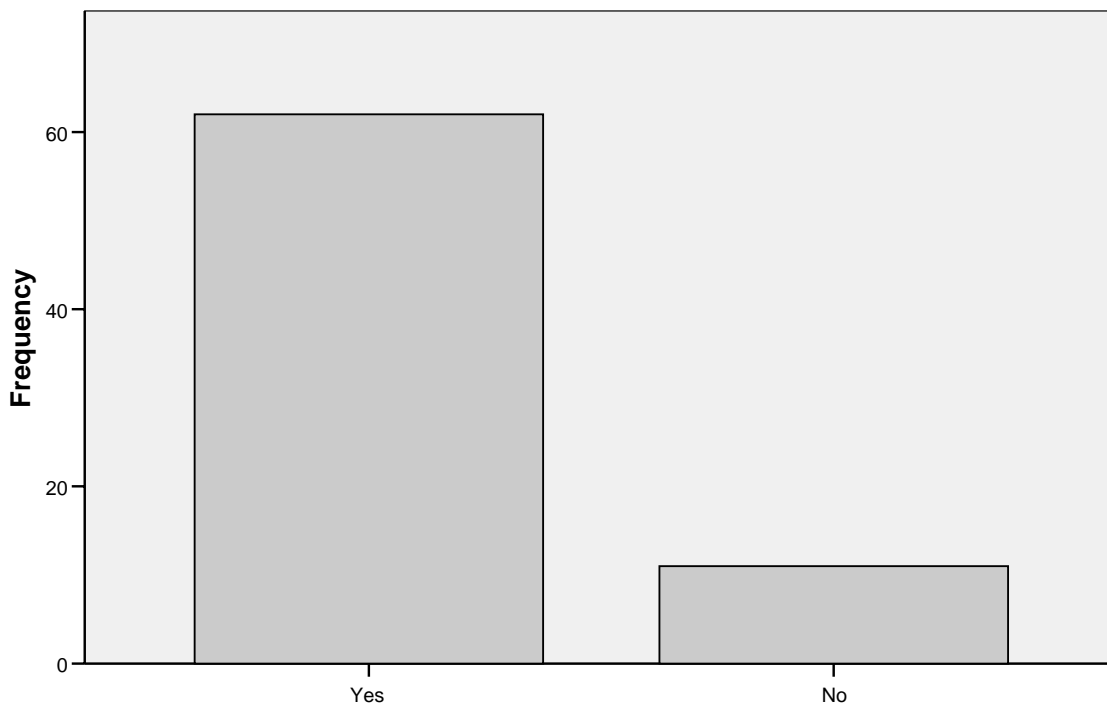
### 18. Do you consider yourself retired? Q25

Of the 73 survey respondents, 42 considered themselves retired (57.5%) and 31 do not consider themselves retired (42.5%).

### Do you live in Florida year-round?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Yes	62	84.9	84.9	84.9
No	11	15.1	15.1	100.0
Total	73	100.0	100.0	

### Do you live in Florida year-round? Q26



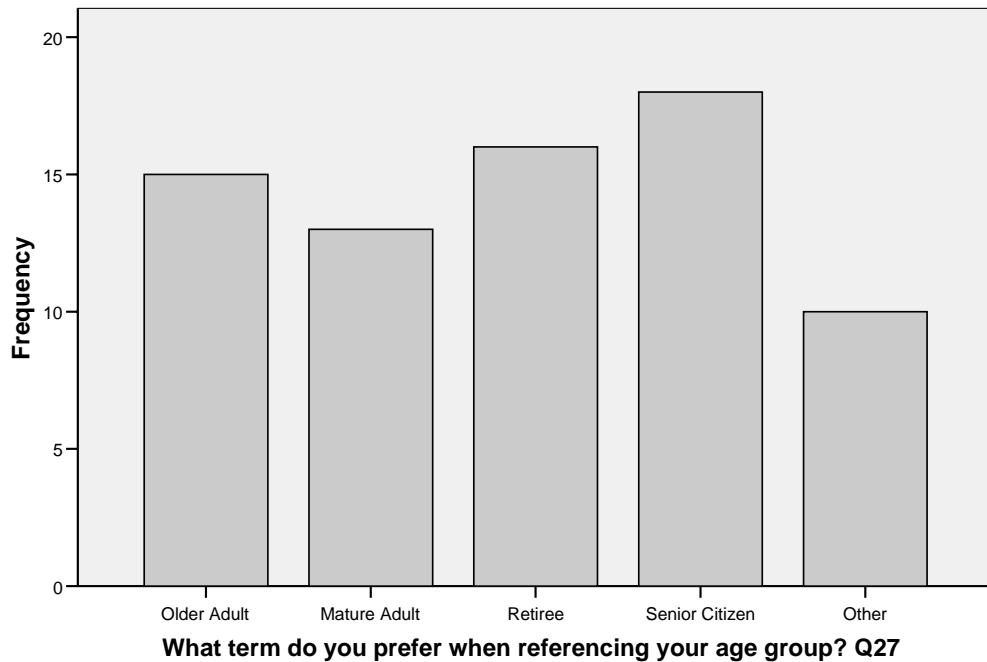
### Do you live in Florida year-round? Q26

Of the 73 survey respondents, 62 live in Florida year-round (84.9%) and 11 do not live in Florida year-round (15.1%).

**What term do you prefer when referencing your age group?**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Older Adult	15	20.5	20.8	20.8
	Mature Adult	13	17.8	18.1	38.9
	Retiree	16	21.9	22.2	61.1
	Senior Citizen	18	24.7	25.0	86.1
	Other	10	13.7	13.9	100.0
	Total	72	98.6	100.0	
Missing	99	1	1.4		
Total		73	100.0		

**What term do you prefer when referencing your age group? Q27**



Of the 73 survey respondents, 15 prefer that their age group be referenced as “older adults” (20.5%), 13 prefer the term “mature adults” (17.8%), 16 prefer the term “retirees” (21.9%), 18 prefer the term “senior citizens” (24.7%) and 10 prefer some other term or indicated “no preference” (13.7%). One did not provide a valid response (1.4%). Based on this data, the sample prefers the term “senior citizens,” although the remaining terms follow relatively close behind in favor.

## ANOVAs

A series of ANOVAS were run to gauge people's knowledge and opinions in regard to adult learning programs.

### ANOVA Sex

Figure 1

The following table shows the significant relationships between sex and seniors' familiarity with adult learning programs.

		<b>Sum of Squares</b>	<b>df</b>	<b>Mean Square</b>	<b>F</b>	<b>Sig.</b>
<b>How familiar are you with the Osher Lifelong Learning Institute? Q1</b>	Between Groups	3.321	1	3.321	<b>3.870</b>	<b>.053</b>
	Within Groups	60.925	71	.858		
	Total	64.247	72			
<b>How valuable are the Volunteer opportunities in your decision to join? Q11</b>	Between Groups	7.877	1	7.877	<b>4.677</b>	<b>.034</b>
	Within Groups	117.901	70	1.684		
	Total	125.778	71			
<b>How valuable are Day trips and other activities in your decision to join? Q12</b>	Between Groups	9.743	1	9.743	<b>4.505</b>	<b>.037</b>
	Within Groups	151.368	70	2.162		
	Total	161.111	71			

## Descriptives

Figure 1.1

		N	Mean	Std. Deviation	Std. Error
<b>How familiar are you with the Osher Lifelong Learning Institute? Q1</b>	Male	34	1.26	.511	.088
	Female	39	<b>1.69</b>	1.173	.188
	Total	73	1.49	.945	.111
<b>How valuable are the Volunteer opportunities in your decision to join? Q11</b>	Male	34	2.21	1.225	.210
	Female	38	<b>2.87</b>	1.359	.220
	Total	72	2.56	1.331	.157
<b>How valuable are Day trips and other activities in your decision to join? Q12</b>	Male	34	2.00	1.348	.231
	Female	38	<b>2.74</b>	1.571	.255
	Total	72	2.39	1.506	.178

**ANOVA**  
**Race/Ethnic Background**

**Figure 2**

The following table shows the significant relationships between seniors' Race/ethnic background and opinions about adult learning programs.

		<b>Sum of Squares</b>	<b>df</b>	<b>Mean Square</b>	<b>F</b>	<b>Sig.</b>
<b>How valuable are Day trips and other activities in your decision to join? Q12</b>	Between Groups	16.542	3	5.514	2.594	.060
	Within Groups	144.569	68	2.126		
	Total	161.111	71			
<b>I believe that information about adult learning programs is easily accessible. Q17</b>	Between Groups	9.089	3	3.030	2.256	.090
	Within Groups	92.664	69	1.343		
	Total	101.753	72			

## Descriptives

Figure 2.1

		N	Mean	Std. Deviation	Std. Error
<b>How valuable are Day trips and other activities in your decision to join? Q12</b>	Asian	5	1.80	1.095	.490
	Black/African American	10	2.00	1.333	.422
	White/Caucasian	52	<b>2.65</b>	1.558	.216
	Hispanic	5	1.00	.000	.000
	Total	72	2.39	1.506	.178
<b>I believe that information about adult learning programs is easily accessible. Q17</b>	Asian	5	1.40	.894	.400
	Black/African American	10	<b>2.90</b>	.876	.277
	White/Caucasian	52	2.77	1.198	.166
	Hispanic	6	2.67	1.366	.558
	Total	73	2.68	1.189	.139

**ANOVA**  
**Educational Level**

**Figure 3**

The following table shows a significant relationship between seniors' educational level and their opinions about adult learning programs.

		<b>Sum of Squares</b>	<b>df</b>	<b>Mean Square</b>	<b>F</b>	<b>Sig.</b>
I have family or friends who are involved in these programs. Q18	Between Groups	6.736	2	3.368	<b>2.494</b>	<b>.090</b>
	Within Groups	90.464	67	1.350		
	Total	97.200	69			

**Descriptives**

**Figure 3.1**

		<b>N</b>	<b>Mean</b>	<b>Std. Deviation</b>	<b>Std. Error</b>
<b>I have family or friends who are involved in these programs. Q18</b>	High School Diploma	28	2.43	1.476	.279
	Batchelor's Degree	28	1.82	.772	.146
	Graduate Degree	14	<b>2.50</b>	1.092	.292
	Total	70	2.20	1.187	.142

**ANOVA  
Retired**

**Figure 4**

**The following table shows the significant relationships between seniors' retirement status and concerns about joining an adult learning program.**

		<b>Sum of Squares</b>	<b>df</b>	<b>Mean Square</b>	<b>F</b>	<b>Sig.</b>
<b>How important is Time? Q4</b>	Between Groups	4.296	1	4.296	<b>3.050</b>	<b>.085</b>
	Within Groups	98.579	70	1.408		
	Total	102.875	71			
<b>How important is Transportation? Q6</b>	Between Groups	15.190	1	15.190	<b>6.496</b>	<b>.013</b>
	Within Groups	163.685	70	2.338		
	Total	178.875	71			
<b>How valuable are the Volunteer opportunities in your decision to join? Q11</b>	Between Groups	14.908	1	14.908	<b>9.412</b>	<b>.003</b>
	Within Groups	110.870	70	1.584		
	Total	125.778	71			
<b>How valuable are Day trips and other activities in your decision to join? Q12</b>	Between Groups	16.479	1	16.479	<b>7.975</b>	<b>.006</b>
	Within Groups	144.633	70	2.066		
	Total	161.111	71			
<b>I believe that information about adult learning programs is easily accessible. Q17</b>	Between Groups	4.780	1	4.780	<b>3.499</b>	<b>.066</b>
	Within Groups	96.974	71	1.366		
	Total	101.753	72			
<b>I am active in the Tampa community. Q19</b>	Between Groups	10.146	1	10.146	<b>4.888</b>	<b>.030</b>
	Within Groups	147.361	71	2.076		
	Total	157.507	72			

## Descriptives

Figure 4.1

		N	Mean	Std. Deviation	Std. Error
<b>How important is Time? Q4</b>	Yes	41	3.83	1.340	.209
	No	31	<b>4.32</b>	.945	.170
	Total	72	4.04	1.204	.142
<b>How important is Transportation? Q6</b>	Yes	41	<b>3.02</b>	1.695	.265
	No	31	2.10	1.274	.229
	Total	72	2.63	1.587	.187
<b>How valuable are the Volunteer opportunities in your decision to join? Q11</b>	Yes	41	<b>2.95</b>	1.396	.218
	No	31	2.03	1.048	.188
	Total	72	2.56	1.331	.157
<b>How valuable are Day trips and other activities in your decision to join? Q12</b>	Yes	41	<b>2.80</b>	1.585	.247
	No	31	1.84	1.214	.218
	Total	72	2.39	1.506	.178
<b>I believe that information about adult learning programs is easily accessible. Q17</b>	Yes	42	<b>2.90</b>	1.185	.183
	No	31	2.39	1.145	.206
	Total	73	2.68	1.189	.139
<b>I am active in the Tampa community. Q19</b>	Yes	42	<b>2.76</b>	1.462	.226
	No	31	3.52	1.411	.253
	Total	73	3.08	1.479	.173

**ANOVA**  
**Live in Florida year-round**

**Figure 5**

**The following table shows the significant relationships between whether seniors live in Florida year-round and concerns about joining an adult learning program.**

		<b>Sum of Squares</b>	<b>Df</b>	<b>Mean Square</b>	<b>F</b>	<b>Sig.</b>
<b>How important is Time? Q4</b>	Between Groups	7.677	1	7.677	<b>5.645</b>	<b>.020</b>
	Within Groups	95.198	70	1.360		
	Total	102.875	71			
<b>How important is Money? Q5</b>	Between Groups	12.113	1	12.113	<b>7.869</b>	<b>.007</b>
	Within Groups	107.762	70	1.539		
	Total	119.875	71			
<b>I am currently a member of an adult learning program. Q13</b>	Between Groups	4.725	1	4.725	<b>3.383</b>	<b>.070</b>
	Within Groups	99.166	71	1.397		
	Total	103.890	72			

**Descriptives**

**Figure 5.1**

		<b>N</b>	<b>Mean</b>	<b>Std. Deviation</b>	<b>Std. Error</b>
<b>How important is Time? Q4</b>	<b>Yes</b>	61	<b>4.18</b>	1.103	.141
	<b>No</b>	11	3.27	1.489	.449
	<b>Total</b>	72	4.04	1.204	.142
<b>How important is Money? Q5</b>	<b>Yes</b>	61	4.05	1.175	.150
	<b>No</b>	11	2.91	1.578	.476
	<b>Total</b>	72	3.88	1.299	.153
<b>I am currently a member of an adult learning program. Q13</b>	<b>Yes</b>	62	2.02	1.152	.146
	<b>No</b>	11	2.73	1.348	.407
	<b>Total</b>	73	2.12	1.201	.141

**ANOVA**  
**Age Group Reference**

**Figure 6**

The following table shows the significant relationships between seniors' preferred age group reference and their opinions about adult learning programs.

		<b>Sum of Squares</b>	<b>Df</b>	<b>Mean Square</b>	<b>F</b>	<b>Sig.</b>
<b>How knowledgeable are you about the purpose of adult learning programs?Q2</b>	Between Groups	12.036	4	3.009	<b>2.292</b>	<b>.069</b>
	Within Groups	87.964	67	1.313		
	Total	100.000	71			
<b>I am currently a member of an adult learning program. Q13</b>	Between Groups	13.540	4	3.385	<b>2.546</b>	<b>.047</b>
	Within Groups	89.071	67	1.329		
	Total	102.611	71			
<b>I believe that information about adult learning programs is easily accessible. Q17</b>	Between Groups	13.457	4	3.364	<b>2.639</b>	<b>.041</b>
	Within Groups	85.418	67	1.275		
	Total	98.875	71			

## Descriptives

Figure 6.1

		N	Mean	Std. Deviation	Std. Error
<b>How knowledgeable are you about the purpose of adult learning programs?Q2</b>	Older Adult	15	<b>3.67</b>	.976	.252
	Mature Adult	13	2.54	.967	.268
	Retiree	16	3.00	1.317	.329
	Senior Citizen	18	3.50	.985	.232
	Other	10	2.90	1.524	.482
	Total	72	3.17	1.187	.140
	<b>I am currently a member of an adult learning program. Q13</b>	Older Adult	15	<b>2.87</b>	1.302
	Mature Adult	13	1.62	1.044	.290
	Retiree	16	1.88	.957	.239
	Senior Citizen	18	2.28	1.018	.240
	Other	10	1.90	1.524	.482
	Total	72	2.14	1.202	.142
<b>I believe that information about adult learning programs is easily accessible. Q17</b>	Older Adult	15	2.07	1.163	.300
	Mature Adult	13	2.69	1.109	.308
	Retiree	16	2.94	.998	.249
	Senior Citizen	18	2.61	1.092	.257
	Other	10	<b>3.50</b>	1.354	.428
	Total	72	2.71	1.180	.139

**ANOVA**  
**Sex**

**How familiar are you with the Osher Lifelong Learning Institute?**

With a mean of 1.69, Female seniors were more knowledgeable about the Osher Lifelong Learning Institute ( $F=3.87, p=.053$ ).

**How valuable are the Volunteer opportunities in your decision to join?**

Female seniors are more likely to believe that volunteer opportunities are valuable in their decision to join ( $F=4.68, p=.034$ ).

**How valuable are Day trips and other activities in your decision to join?**

Female seniors are more likely to believe that day trips are valuable in their decision to join OLLI-USF ( $F=4.51, p=.037$ ).

**ANOVA**  
**Race/Ethnic Background**

**How valuable are Day trips and other activities in your decision to join?**

White/ Caucasian seniors are likely to find volunteer opportunities to be valuable in their decision to join ( $F=2.59, p=.06$ ).

**I believe that information about adult learning programs is easily accessible.**

Black/African Americans were likely to find the information about adult learning program to be easily accessible ( $F=2.26, p=.90$ ).

**ANOVA**  
**Educational Level**

**I have family or friends who are involved in these programs.**

Seniors with a Graduate degree were more likely to have family or friends in adult learning programs ( $F=2.49, p=.09$ ).

**ANOVA**  
**Retired**

**How important is Time?**

Senior that do not consider themselves to be retired were less likely to find time as an important factor in their decision to join an adult learning community ( $F=3.05, p=.085$ ).

**How important is Transportation?**

Seniors that consider themselves to be retired were significantly more likely to find transportation important when deciding to join an adult learning community ( $F=6.50, p=.013$ ).

**How valuable are the Volunteer opportunities in your decision to join?**

Seniors that consider themselves to be retired were significantly more likely to find volunteer opportunities valuable in their decision to join an adult learning community ( $F=9.41, p=.003$ ).

**How valuable are Day trips and other activities in your decision to join?**

Seniors that consider themselves to be retired were significantly more likely to find day trips and other activities valuable in their decision to join an adult learning program ( $F=7.975, p=.006$ ).

**I believe that information about adult learning programs is easily accessible.**

Seniors that consider themselves to be retired were likely to find information about adult learning programs easily accessible ( $F=3.50, p=.066$ ).

**I am active in the Tampa community.**

Seniors that do not consider themselves to be retired were significantly more likely to be active in the Tampa Community ( $F=7.89, p=.03$ ).

**ANOVA**

**Live in Florida year-round**

**How important is Time?**

Seniors that live in Florida year-round were significantly more likely to find time important in their decision to join an adult learning community ( $F=5.65, p=.02$ ).

**How important is Money?**

Seniors that live in Florida year-round were significantly more likely to find money important in their decision to join an adult learning community ( $F=7.87, p=.007$ ).

**I am currently a member of an adult learning program.**

Seniors that do not live in Florida year-round were more likely to be a member of an adult learning program ( $F=3.38, p=.07$ ).

**ANOVA**

**Age Group Reference**

**How knowledgeable are you about the purpose of adult learning programs?**

Seniors that preferred to be called 'Older Adult' were significantly more likely to be knowledgeable about the purpose of adult learning programs ( $F=2.29, p=.07$ ).

**I am currently a member of an adult learning program.**

Seniors that preferred to be called 'Older Adult' were significantly more likely to be a current member of an adult learning program ( $F=2.546, p=.047$ ).

**I believe that information about adult learning programs is easily accessible. Q17**

Seniors that preferred to be called by 'other' references to their age group were more likely to believe that information about adult learning programs are easily accessible ( $F=2.64, p=.041$ ).

**Quantitative Limitations**

- Survey of local seniors done at various locations in Hillsborough County, including shopping malls, grocery stores and a library. Potential survey participants were approached on the assumption that they were over 55 years old and lived in Hillsborough County, which may have been incorrect in some cases.
- An overwhelming majority of respondents were white/Caucasian (71.2%), so an ANOVA analysis based on race would not produce any significant results since data was skewed toward this group.
- The item designed to determine the respondent's education level was not exhaustive—there was not an option for individuals who had completed “some college” or obtained an “associate's degree.”
- The survey did not produce the needed number of valid responses to generalize results (381). Only 73 completed surveys were used in this analysis, therefore it cannot be generalized.
- No distinction was made between surveys gathered by telephone and those gathered via a convenience method.

## **S.W.O.T. Analysis**

### **Strengths**

- Growing and devoted membership (1000+)
- Completely volunteer-run organization with strong potential volunteer pool
- Relatively inexpensive compared to other OLLIs and continuing education programs
- University affiliation lends great credibility to the organization
- Classes offered at venues throughout the local community to make learning more accessible to senior students
- The organization supports a positive mission and cause
- Established strong member communications through e-mail and paper-based materials
- Effective two-way communication between staff and membership
- Educated membership with bachelor's and advanced degrees
- Conducted member survey in Spring 2007 of 294 OLLI members to compile an OLLI-USF Member Profile
- Benefits of OLLI membership, which include registration privileges, "members only" programs, borrowing privileges at the USF Tampa library, socials and special events, and access to the "Lunch and Learn" lecture series
- Strong sense of community among members and staff

### **Weaknesses**

- Lack of cultural or ethnic diversity among members
- Poor development strategies for acquiring new donors and fundraising
- Low profile in local community, particularly among seniors
- Rudimentary Web site that lacks aesthetic appeal
- Campus location presents obstacles to seniors; these include crowded parking facilities, feelings of alienation or fear associated with entering a large college campus, and difficulty finding OLLI-USF's office

- Due to the organization's affiliation with the university, it must adhere to specified regulations and policies regarding fundraising
- Lacks brand awareness; long-time members still refer to the organization as the separate entities of Learning in Retirement (LIR) and SeniorNet
- Few bilingual instructors for classes
- The organization doesn't possess a central facility
- Membership must be renewed at the end of each fiscal year, regardless of when members join
- Members must purchase parking permits to attend OLLI classes

### **Opportunities**

- Improve development efforts through the creation of marketing materials and advancement of the development committee
- Increase ethnic diversity through outreach to select civic, cultural and professional groups
- Increase awareness of OLLI-USF among Tampa seniors and the local community
- Located in a diverse metropolitan area with extensive resources
- Interest in offering broader range of classes
- Recruit bilingual instructors to promote diversity in the classroom
- Large, local population of seniors
- Strengthen existing community partnerships to forge new partnerships and increase local brand awareness
- Reach younger audience of 40- to 50-year-old Tampa residents

### **Threats**

- Other adult learning communities, including other OLLI programs (Eckerd OLLI)
- Inactive seniors with a generally disinterested, apathetic attitude toward continuing education

- Low donor frequency and contributions
- Caters to an older demographic who tends to be lethargic and more concerned with health, financial or family matters
- Ongoing parking problems due to campus overcrowding
- Senior demographic is less likely to use the Internet and e-mail
- Low ethnic diversity makes minority members feel isolated and alienated, and perpetuates cultural stereotypes
- OLLI-USF members largely don't recognize that the organization has a problem with ethnic diversity

## OLLI-USF Research Budget

<b>Voter Registration CD</b> .....	\$6.50
<b>3 pk video tapes</b> .....	\$14.76
<b>Focus Group:</b>	
Party tray.....	\$6.99
Bottled Water.....	\$4.29
Fruit tray.....	\$9.99
Plates.....	\$0.00
Cups.....	\$0.00
Napkins.....	\$0.00
Paper.....	\$0.00
Pencils .....	\$0.00

No charges have been added for use of audio/visual equipment since it will be provided free-of-charge from the USF School of Mass Communications.

**Research Total: \$42.53**