

<b>Agency</b>	LifeLong Learning Organization of San Marcos
<b>Program</b>	Courses and Events
<b>San Marcos Service Address</b>	San Marcos Public Library, VFW Hall, online
<b>Requested</b>	\$9,354
<b>Recommended</b>	\$8,000

	Lifelong Learning Organization of San Marcos Courses and Events
<b>Application Completeness Check for HSAB</b>	
<b>Questions</b>	
Are all questions answered?	Yes
Is the application signed? (this is a certification)	Yes
Does the program have measurable outcomes?	Yes
Is the agency a Human Services Agency?	Yes
Is the agency overseen by a Board of Directors?	Yes
<b>Required Attachments</b>	
<b>BUDGETS</b>	
1. Agency budget for current fiscal year	Yes
2. Agency budget proposed for next fiscal year	Yes
3. Program budget for current fiscal year	Yes
4. Program budget proposed for next fiscal year	Yes
5. Budget showing the exact uses of the HSAB funding	Yes
<b>BOARD OF DIRECTORS INFORMATION</b>	
6. Board of Directors membership roster	Yes
7. Board of Directors Meeting Attendance Record for current year	Yes
8. Board of Directors City of Residence	Yes
9. Board of Directors membership criteria	Yes
<b>ORGANIZATION INFORMATION</b>	
10. Organizational chart with names and titles of staff	Yes
11. Current IRS Form 990, pages 1 and 2 (not required for churches)	Yes
12. Non-discrimination policy statement	Yes
<b>Preferred Attachments - 3 Letters of Support</b>	
Letters of support from members of the San Marcos Community	Yes
<b>Attachments if Applicable</b>	
Latest audit or CPA signed review, if applicable	
Policies and Procedures for the proposed Program, if available	
<b>Note: We are not requiring Texas Secretary of State registration</b>	



## City of San Marcos Human Services Grants FY 2025 Application

### I. SUMMARY INFORMATION

**Applicant Organization:** LifeLong Learning Organization of San Marcos, Texas

**Contact Name:** Dr. Marianne Reese **Telephone:** 512-216-6427

**Contact E-Mail Address:** lifelonglearningsm@gmail.com **Website:** www.LLLsanmarcos.org

**Mailing Address:** 1411 Madrid Trace, San Marcos, TX 78666

**San Marcos Service Address for this Program:** 1411 Madrid Trace, San Marcos, TX 78666

**Who is authorized to execute program documents?** Dr. Marianne Reese, Founder and Director

**Program Name:** LifeLong Learning Courses and Events

**Amount of Funds Requested:** \$9,354

**What percentage of the cost of this program is requested as funding through this application?** 41%

### II. QUESTIONS

#### OVERVIEW

#### 1. What is the agency's or organization's mission?

The **mission** of Lifelong Learning-San Marcos (LLL-smtx) is to provide accessible no-cost/low-cost experiences for San Marcos-area older adults to explore, question, learn, and engage with others.

Our **vision** is that San Marcos seniors' quality of life is enhanced through our enjoyable informative, stimulating, social learning experiences.

#### 2. Briefly summarize the program for which funding is being requested and the services it provides.

In 2014 Dr. Marianne Reese began a lifelong learning program as a community outreach initiative of the Texas State University Retired Faculty and Staff Association. LLL-smtx operated within University Advancement until 2017, when it was determined that University support for the organization was not viable. Therefore, LLL-smtx became a 501(c)(3) nonprofit organization in November 2017.

Over our 10 years of delivering stimulating and engaging courses, lectures, tours, and unique presentation series, and establishing beneficial partnerships with other nonprofits, LifeLong Learning has provided ever-increasing opportunities for San Marcos-area senior "students" to form new

relationships, engage in meaningful volunteerism by sharing their expertise, learn new hobbies, learn about themselves and their community, and be cognitively stimulated.

Our wide variety of offerings are presented at local venues and via Zoom by community members and Texas State professors and retirees who have rich knowledge of their subject areas and are excited to share that knowledge. Course content has included the arts (e.g., art history, painting, drawing, quilting, writing), genealogy, science (e.g., geology of the Hill Country, Chemistry in the Kitchen), health and wellness activities (e.g., line dancing, yoga, flexibility and balance), speaking Spanish, and current affairs (e.g., the U.S. Supreme Court, challenges facing America).

LLL-smtx offerings include:

- Free and low-cost courses in person and via Zoom: Typically, one session each week for four to six weeks. Some of our Zoom offerings are programs through the Print Museum of Houston and Connect 2-Texas, a network of Texas-based educational content providers including museums, authors, and cultural, historical, and scientific organizations.
- Free in person and Zoom tours: 9/11 Museum in New York City, Flatbed Press in Austin, the Art of David Everett held by the Wittliff Collections at Texas State as well as a virtual tour of his art studio, Texas State Forensic Anthropology Research Center (aka “body farm”), and one-day bus tour of the Texas Hill Country
- Free in person and Zoom book clubs: Mystery, Science Fiction, and Texas/Western Literature
- Free Presentation Series at the San Marcos Public Library: Unique topics presented by local experts once per week for five to seven consecutive weeks. Topics include Studying the Formation of Terrestrial Planets, How to Communicate Like C.S. Lewis, Sculptural Explorations, Macroinvertebrates in the San Marcos River, Britt Johnson -- the Man and the Myth, San Marcos Police Department initiatives, healthy and nutritious eating habits, and cults.

LifeLong Learning forms mutually beneficial partnerships with various other nonprofits to offer programs or help support upcoming events. Past and current partners include the Mermaid Society, Cheatham Street Warehouse, KZSM-San Marcos Community Radio, Price Center, San Marcos Parks and Recreation, San Marcos Public Library, Youth Service Bureau, Texas State International Piano Festival, and Aging Forward Central Texas.

## **COMMUNITY NEED AND JUSTIFICATION - 20 POINTS**

### **1. Describe in detail the need for this program in San Marcos.**

According to the U.S. Census Bureau, the 2010 San Marcos population was 43,282, with 3,809 (8.8%) 60 years and older. Over the next 10 years, the senior population exploded. According to 2020 census data, 11,184 (16.6%) of San Marcos’s 67,553 population was ages 60 and over, a 189% increase.

By engaging in ongoing education and exploration, seniors can maintain their mental acuity, foster social connections, enhance self-esteem, and stay adaptable in a changing world. This, in turn, leads to a more fulfilling and enjoyable life.

In communities where major universities exist, the university often provides regular adult learning opportunities for the citizens of their community. Unfortunately, this is not the case in San Marcos, nor does the City or school district offer programming for adult learners. Therefore, LifeLong

Learning fills a critical need by targeting San Marcos seniors to ensure they have meaningful opportunities to explore, learn, and engage with others.

## **2. Has the need for this program been increasing in recent years?**

Due to the tremendous increase of San Marcos's senior population as noted above, the need for LLL-smtx programming continues to grow as we strive to serve more individuals each year.

Further, according to the University of Michigan National Poll on Healthy Aging, 27% of adults aged 50-80 reported feeling isolated from others in 2018. Isolation peaked at 56% in 2020 and has remained above pre-pandemic levels, with 34% of seniors reporting infrequent contact with others in 2023. Multiple studies document the impact of social isolation and loneliness on seniors' health, including significant increases for the risk of dementia, heart disease, stroke, depression, anxiety, and premature death.

To combat the isolation and loneliness experienced by many of our participants during the pandemic, we moved all our programming to Zoom to ensure LifeLong Learning participants had regular opportunities to engage in learning and social stimulation. In a March 2021 survey of our 623 contacts (15% response rate) 67% of respondents wanted Zoom courses to continue beyond the Covid restrictions. Respondents also reported a 4.6/5.0 rating for the quality of LLL-smtx offerings.

Due to increasing food insecurity rates, LifeLong Learning is partnering with Aging Forward Central Texas, a new San Marcos nonprofit, and the San Marcos Housing Authority (SMHA) to develop and deliver *Healthier Together*, which is described in more detail in the Impact section below. This six-week nutrition course will be offered in Fall 2024 for the first time to support 15 low-income seniors in reducing social isolation and food insecurity through sharing information on the basics of nutrition, health, disease, and food safety and demonstrating how to be creative in the kitchen to prepare healthy meals and snacks. In 2025, *Healthier Together* will be offered three times at SMHA properties, serving a total of 45 low-income seniors. LLL-smtx will also offer a similar course to San Marcos older adults through its regular programming.

LLL-smtx's mission to provide accessible no-cost/low-cost experiences for San Marcos-area older adults to explore, question, learn, and engage with others resonates with our senior community and we strive to grow the frequency and variety of our offerings in direct response to the needs and interests of our senior community.

## **3. Client Information**

### **a. Describe the direct clients for this program.**

On April 2, 2024, the City of San Marcos issued a proclamation recognizing LifeLong Learning's decade of impactful service to older adults in the area. Data from 2015-2023 and the first half of 2024 provide a snapshot of LLL-smtx participants:

- over 20,000 (duplicated) individuals have participated in courses and events
- 140 individuals have served as instructors and presenters
- 90% of participants live in San Marcos; the remaining 10% live in Austin, Buda, Kyle, Canyon Lake, Lockhart, Martindale, New Braunfels, Spring Lake, and Wimberley as well as California, Florida, Georgia, Maine, and Massachusetts
- 70% of participants are women
- the average age of participants is 67 years

**b. How is the program marketed to direct clients? How do you find these clients?**

As LifeLong Learning has grown and matured, we rely on our website, regular emails listing courses and events, notices in the Community Calendar of each Sunday's San Marcos Daily Record, newsletters and website information provided by San Marcos Parks and Recreation and San Marcos Public Library, and by participants sharing their experiences with friends and inviting them to attend. We also provide information and links to programs of interest provided by our partners, thereby broadening our community's knowledge of opportunities for seniors to be socially and mentally engaged.

**c. Expected total annual unduplicated direct clients who are City of San Marcos residents**  
500

**IMPLEMENTATION - 15 POINTS**

**1. How exactly will these funds be used?**

The major categories of requested funding are personnel, technology support, course support, and office supplies

- Personnel funding (\$4,900) provides partial support for the assistant director's stipend for marketing and grant seeking work as well as honoraria for course instructors
- Technology support funding (\$887) covers the annual fees for critical platforms (website, email, online meetings) in the marketing and delivery of courses
- Course support (\$2,317) provides partial support for course content provider fees (e.g., museums, education consortia), supplies, refreshments, and copyright licenses
- Office supplies (\$1,250) covers printer cartridges, paper, and other necessary supplies

**2. What specific, measurable outcomes or results do you hope to achieve with this program?**

- 15% increase in number of unduplicated participants
- Minimum of 4.5/5.0 overall quality of courses and events as reported by participants
- 45 SMHA senior residents register for *Healthier Together* and, based on pre-/post-tests
  - 80% complete all six sessions
  - 50% demonstrate improved knowledge of the relationship of diet to health-related illness
  - 50% report decreases of stress and symptoms of depression due to decreased feelings of loneliness, isolation, and anxiety.

**3. List the title of each position for which funding is requested and the activities associated with those positions.**

- Assistant Director stipend (request \$2,000 of \$6,000 stipend) -- Since 2021, she has managed and enhanced our website and developed engaging communications about courses, events, and other LifeLong Learning offerings, including events hosted by community partners. With a background in nonprofits and grant writing, she also assists with grant funding acquisition.
- Registered Dietician Nutritionist (RDN) honoraria (request \$900 of \$1,800 honorarium) -- She will utilize her expertise to lead our new *Healthier Together* courses at three San Marcos Housing Authority communities.
- Instructor honoraria (request \$2,000 of \$4,625) -- Most of our instructors offer their expertise and time at no charge to LLL-smtx. For multi-week, low-cost courses requiring participants to pay a registration fee, instructors receive, on average, a \$400 honorarium. Presenters of single events receive a \$25 gift card.

4. If funding is not available at the requested amount, what is the minimum Human Services Grant funding needed to be able to run this program? \$8,354

#### IMPACT AND COST EFFECTIVENESS - 25 POINTS

1. Programs can provide value by deeply impacting the lives of a few, with effects that may ripple through generations, or by providing smaller but meaningful impact to a larger group. Describe in detail the impact this program will have on the identified need and on San Marcos residents.

As noted in the *Community Need and Justification* section, the offerings of LifeLong Learning provide a vital source of camaraderie and interactions among San Marcos seniors, helping to mitigate the likelihood of isolation and loneliness that can lead to negative health outcomes.

We know we make a difference in people's lives as they refer friends to LLL-smtx offerings, ask to present a lecture or course, recommend topics of interest, and keep coming back for more. The following are illustrative of the feedback received from LifeLong Learning participants:

- *Thank you for creating LLL. It has filled a gap in San Marcos' culture, bringing connection, discourse, learning and light to our community, soldiering on through thick and thin.*  
~ Susan Shield Polk, 2024
- *I moved here in 2020 without knowing anyone. Without LLL programs I would not be enjoying so many wonderful opportunities and people. It made all the difference in the quality of my life.*  
~ Bernadette Brown, 2024
- *Becky's class was especially important to me this year, not only because it was so good, but also because it very powerfully reminded me that beautiful and wonderful things are associated with my state, where I was born and have lived all my life. How I have needed that reminder this year.*  
~ Johnathan Grant 2021

We are especially excited about a new course that will focus on low-income San Marcos seniors experiencing food insecurity and isolation. *Healthier Together* is the result of a new partnership with Aging Forward Central Texas, a new San Marcos nonprofit, and the San Marcos Housing Authority (SMHA). *Healthier Together* is a six-week nutrition course that will be offered for the first time in Fall 2024 onsite at SMHA's Allen Woods community.

Each course, led by a registered dietitian nutritionist (RDN), will provide 15 low-income senior residents information on nutrition and healthy eating habits and include on-site cooking demonstrations preparing healthy meals using food provided by the San Marcos Food Bank's Hope Project. Each participant will receive an electric can opener and spices; upon successful completion of the course, participants will receive a \$100 gift card toward the purchase of needed cooking supplies (e.g., cookware, utensils, perishable food) to help ensure they can implement what they learn about preparing healthy and nutritious meals and snacks. (Note: Funding is not requested for this course completion incentive.)

During fiscal year 2025, the course will be offered to 15 residents at each of three SMHA communities. LLL-smtx will also offer a similar course to San Marcos older adults through its regular programming.

*Healthier Together* is the first step in a broader initiative to support the well-being of about 575 low-income households, including elderly and disabled people living in the five SMHA communities. A cognate addressing health and wellness and accessing health care services is under development and we plan to offer periodic refresher sessions.

**2. Discuss the amount of overhead compared to program costs.**

LifeLong Learning operates from the home of the Director, and she has never sought nor received reimbursement for overhead expenses, nor has she been compensated for the time required to manage LifeLong Learning's operations.

Program costs have been controlled and, due to the following factors, LLL-smtx has been able to maintain its goal of free or low-cost course offerings:

- a significant \$10,000 donation in 2020
- courses have been conducted in mostly free venues
- most instructors have offered their expertise and time at no cost
- 80% of fees collected for courses at the San Marcos Activity Center went to the instructor, with the remaining allocated to the Activity Center

As LifeLong Learning looks to the future, several challenges must be addressed, and these are described in Item 4 below.

**3. Provide a brief description of other funding sources, volunteers, or in-kind donations that are expected to be used with this program.**

As of July 1, \$4,100 remains of the \$10,000 donation noted above and total annual donations, ranging from \$25 to \$300, typically total \$1,600. A grant application to the Lions Club of San Marcos awaits a funding decision and grant seeking activities are now more intentional to ensure sufficient funds are raised to meet the estimated 2024FY budget.

The LLL-smtx Director and Advisory Council members are volunteers (excepting the assistant director's responsibilities), as are approximately 70% of our presenters/instructors.

Courses offered at the San Marcos Public Library are always free. The library does not charge LLL-smtx for the use of its spaces and library staff provide set-up and technology support.

Based on the recommendations of the ad hoc committee described below, we anticipate that additional revenue structures will be implemented prior to the end of fiscal year 2024.

**4. What has your organization done in the past two years to raise different funding for this program?**

Prior to June of this year, 80% of fees collected for courses held at San Marcos Parks and Recreation facilities were received and disbursed by Parks & Rec to the instructor, with the remaining 20% retained by Parks & Rec. In June, LifeLong Learning was approved as a Parks & Rec vendor. This designation provides new revenue -- 80% of collected fees -- for courses conducted at their venues. Most of these new funds will be used for instructor honoraria; a small percentage will be applied to LifeLong Learning operating expenses.

LLL-smtx is now at an inflection point. To date, LifeLong Learning has been largely a "one woman operation," with the director responsible for securing instructors/presenters. The existing model of free and low course fees is not sufficient to cover the costs of honoraria for instructors who request one as well as increasing operational expenses. It also severely hampers our ability to seek new partnerships to execute more impactful programs. Finally, and critically, the founder and director of LLL foresees a time in the near future when she will "retire" for a second time.



In light of these opportunities and challenges, on May 17, 2024, the Advisory Council created an Ad Hoc Committee on Planning the Future of LifeLong Learning with the charge of charting a course for the future success and sustainability of the organization. Clearly, future operations must include a revamped fee structure, more aggressive fundraising, and likely a paid director.

The Council's Secretary chairs the committee and other members include the Associate Director (instructor and participant), two long-time participants, and one instructor. The Committee's report and recommendations are due to the Advisory Council in August 2024 and will drive planning for the next phase of LLL-smtx.

#### **COMMUNITY SUPPORT – 10 POINTS**

**1. Please submit 3-5 letters of reference that indicate strong local support for the program and the agency's ability to implement it as described in the application.**

- Dr. Steve Beebe, presenter and participant
- Dr. Frank Podosek, major donor, presenter, and participant
- Diane Insley, Director, San Marcos Public Library
- Patty Margerison, founding Advisory Council member and participant
- Dr. Oren Renick, Director, Aging Forward Alliance

**2. How is the Board of Directors selected?**

LifeLong Learning's Advisory Council is composed of instructors, presenters, and participants from the community, including TX State University, with whom the director has existing relationships and who bring different skills sets to the Council. Two of the original six members appointed in 2017 have been replaced by unanimous decisions by the Advisory Council: one member is deceased and one resigned for health reasons. The Advisory Council added a seventh member in 2023.

As a result of LLL-smtx's growth and look toward the future, the organization's bylaws are currently under review and will be revised by the end of the year. Revisions are expected to sections addressing methods of selecting members and officers.

**3. How often does the Board meet?**

The Advisory Council meets a minimum of twice a year and other times as needed.

**4. What actions do Board members take to support the programs of the agency or organization?**

Members of the Advisory Council present, promote, participate, and donate time and money to the organization. They present ideas to improve operations and serve as a sounding board to the director as she considers new approaches to increase the impact of LifeLong Learning.

The Council's most significant actions will occur when they receive and act on the report of the Ad Hoc Committee, making decisions to guide the future of the organization.

**5. How many volunteers does your agency or organization have and how many hours do they spend on the program requesting funding?**

The director volunteers her time to oversee all aspects of LifeLong Learning's operations, working an average of 30 hours per week. Most instructors and presenters offer their expertise and time at no cost to LLL-smtx. As previously noted, Advisory Council members are volunteers.

The Director leads efforts to identify potential funding sources; however, these efforts will increase as the assistant director focuses more time on prospecting. In the past two months, three grant proposals (including this one) will be submitted. Compare this effort to the previous seven years, when a total of seven proposals were submitted.

#### **COUNCIL PRIORITIES - 30 POINTS**

**1. How long has this program served San Marcos residents? (10 points if at least 2 years)**

10 years

**2. Does the agency have an office in San Marcos? (10 points if yes)**

Although Dr. Reese's study at 1411 Madrid Trace qualifies as "an office" under IRS rules, no such claim has been filed for tax purposes.

**3. Describe how this funding creates an increase in services or an increase in the number of people served. (10 points)**

Each year we continue to increase the number of participants as LLL-smtx course and event data from 2015 to 2023 demonstrate:

- 2015: 1,958 duplicated participants (data from our first year, 2014, was lost due to computer crash)
- 2023: 3,173 duplicated participants (62% increase)

Funding to support our new partnership with Aging Forward Central Texas and the San Marcos Housing Authority will not only result in 45 new participants in our *Healthier Together* courses, but it will provide the foundation for a broader initiative to offer additional health and wellness courses and services across the three main SMHA communities in the coming years.

#### **III. FUNDING RESTRICTIONS**

By signing this application, I certify the following to be true:

1. All Human Services Grant funding will be spent on San Marcos residents, except for school-based programs, in which case it may be spent within the San Marcos Consolidated Independent School District boundary.
2. Funding requested is not more than 50% of the total funding for the agency.
3. Funding will not be used to fund more than 20% of a full-time position.
4. Agency has been in existence for at least 2 years.

**SUBMITTED AND APPROVED BY:**

Signature *Marianne Reese* Date July 28, 2024

Printed Name: Dr. Marianne Reese

Title: Founder and Director

## **Final Performance Report for 2023 Funding**

Not applicable

## BUDGETS

LifeLong Learning Organization of San Marcos TX  
Organization Budget, FY2024 (Jan-Dec)

<u>Estimated Revenue</u>	
Grants	
Burdine Johnson Foundation (pending)	\$ 2,369
Donations	\$ 1,600
Courses/Events Fees	\$ 1,588
Balance from 2020FY \$10,000 Donation	\$ 4,100
<b>Total Revenue</b>	<b>\$ 9,657</b>
<u>Estimated Expenses</u>	
Personnel	
Assistant Director Stipend (\$125/mo)	\$ 1,500
Instuctor Honoraria/Courses and Events	\$ 1,500
Content Provider Fees (e.g., museums, educational consortia)	\$ 750
Technology Support	
Microsoft Office (80%/5 months)	\$ 33
Website Platform and Domain Name (Wix)	\$ 369
Email Platform (Mailchimp)	\$ 156
Online Course Platform (Zoom)	\$ 320
Supplies & Equipment	
Courses and Events	\$ 1,000
Office	\$ 1,250
Copyright Licenses	\$ 300
Reserve Fund	\$ 1,000
<b>Total Expenses</b>	<b>\$ 8,178</b>

LifeLong Learning Organization of San Marcos TX  
Estimated Organization Budget, FY2025 (Jan-Dec)

<u>Estimated Revenue</u>	
Grants	
San Marcos Human Services	\$ 9,354
San Marcos Lions Club	\$ 2,000
Grant Funds	\$ 10,000
Courses/Events Fees	\$ 4,200
Donations	\$ 1,800
<b>Total Revenue</b>	<b>\$ 27,354</b>
<u>Estimated Expenses</u>	
Personnel	
Assistant Director Stipend (\$500/mo)	\$ 6,000
Nutritionist Honoraria/Healthier Together (\$600/course)	\$ 1,800
Instuctor Honoraria/Courses and Events	\$ 4,625
Content Provider Fees (e.g., museums, education consortia )	\$ 750
Technology Support	
Microsoft Office (80%)	\$ 84
Website Platform and Domain Name (Wix)	\$ 387
Email Platform (Mailchimp)	\$ 164
Online Course Platform (Zoom)	\$ 336
Supplies & Equipment	
Courses & Events	\$ 2,365
Office Supplies	\$ 1,250
Partipcant Incentives -- Healthier Together completion	\$ 4,500
Refreshments	\$ 280
Copyright Licenses	\$ 300
Reserve Fund	\$ 2,000
<b>Total Expenses</b>	<b>\$ 24,841</b>

LifeLong Learning Organization of San Marcos TX  
Courses and Events Program Budget, FY2024 (Jan-Dec)

<u>Estimated Expenses</u>	
Personnel	
Assistant Director Stipend (\$125/mo)	\$ 1,500
Instuctor Honoraria/Courses and Events	\$ 1,500
Content Provider Fees (e.g., museums, educational consortia)	\$ 750
Technology Support	
Microsoft Office (80%/5 months)	\$ 33
Website Platform and Domain Name (Wix)	\$ 369
Email Platform (Mailchimp)	\$ 156
Online Course Platform (Zoom)	\$ 320
Supplies & Equipment	
Courses and Events	\$ 1,000
Office	\$ 1,250
Copyright Licenses	\$ 300
Reserve Fund	
<b>Total Expenses</b>	<b>\$ 7,178</b>

LifeLong Learning Organization of San Marcos TX  
Estimated Courses and Events Program Budget, FY2025 (Jan-Dec)

<u>Estimated Expenses</u>	
Personnel	
Assistant Director Stipend (\$500/mo)	\$ 6,000
Nutritionist Honoraria/Healthier Together (\$600/course)	\$ 1,800
Instructor Honoraria/Courses and Events	\$ 4,625
Content Provider Fees (e.g., museums, education consortia )	\$ 750
Technology Support	
Microsoft Office (80%)	\$ 84
Website Platform and Domain Name (Wix)	\$ 387
Email Platform (Mailchimp)	\$ 164
Online Course Platform (Zoom)	\$ 336
Supplies & Equipment	
Courses & Events	\$ 2,365
Office Supplies	\$ 1,250
Participant Incentives -- Healthier Together completion	\$ 4,500
Refreshments	\$ 280
Copyright Licenses	\$ 300
Reserve Fund	
<b>Total Expenses</b>	<b>\$ 22,841</b>

LifeLong Learning Organization of San Marcos TX  
Proposed Use of HSAB Funding, FY2025 (Jan-Dec)

Personnel	
Assistant Director Stipend (\$500/mo)	\$ 2,000
Nutritionist Honoraria/Healthier Together (\$600/course)	\$ 900
Instuctor Honoraria/Courses and Events	\$ 2,000
Content Provider Fees (e.g., museums, education consortia )	\$ 500
Technology Support	
Microsoft Office (80%)	
Website Platform and Domain Name (Wix)	\$ 387
Email Platform (Mailchimp)	\$ 164
Online Course Platform (Zoom)	\$ 336
Supplies & Equipment	
Courses & Events	\$ 1,237
Office Supplies	\$ 1,250
Partipcant Incentives -- Healthier Together completion	
Refreshments	\$ 280
Copyright Licenses	\$ 300
Reserve Fund	
<b>Total Expenses</b>	<b>\$ 9,354</b>



## BOARD OF DIRECTORS INFORMATION

### Roster

Director: Marianne Reese, PhD, San Marcos  
Associate Director: Becky D. Reese, MA, San Marcos  
Assistant Director: Stephanie Korcheck, MPubAff, San Marcos  
Secretary: Sue Beebe, MA, San Marcos  
Treasurer: Wayne A. Schurter, EdD, San Marcos  
Jane Hughson, San Marcos  
Patsy Pohl, San Marcos

### FY2024 Meeting Attendance

Feb. 19 -- Present: Marianne Reese, Becky D. Reese, Stephanie Korcheck, Wayne A. Schurter, Sue Beebe, Jane Hughson  
Absent: Patsy Pohl  
May 17 -- Present: Marianne Reese, Becky D. Reese, Stephanie Korcheck, Jane Hughson  
Absent: Wayne A. Schurter, Sue Beebe, Patsy Pohl

### Membership Criteria

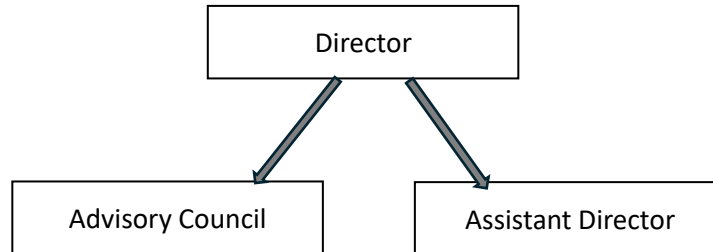
Five of the seven members have served on the Advisory Board since its formation in 2017 when LifeLong Learning of San Marcos gained nonprofit status. They were asked by the Director to serve due to their expertise and participation both as participants and instructors from 2014 to 2017, as well as their dedication to the mission of LLL-smtx.

Two members were selected by the Council to fill a position due to the death of Cathy Supple, an original Council member, and the resignation of another, Patty Margerison.

The organization's bylaws are currently under review and will be revised by the end of the year. Revisions are expected to sections addressing methods of selecting members and officers.

## ORGANIZATION INFORMATION

### Organizational Chart



### IRS Form 990

Because LifeLong Learning has revenue below \$50,000, it is exempt from completing the full Form 990; instead, it submits a postcard [Form 990-N (e-Postcard)] each year affirming revenue below \$50,000.

The documentation below confirms that LifeLong Learning is current on its required filings.

### Lifelong Learning Organization of San Marcos Texas

EIN: 82-3006115 | San Marcos, Texas, United States

#### Publication 78 Data

Organizations eligible to receive tax-deductible charitable contributions. Users may rely on this list in determining deductibility of their contributions.

On Publication 78 Data List: Yes

Deductibility Code: PC ⓘ

#### Determination Letter

A favorable determination letter is issued by the IRS if an organization meets the requirements for tax-exempt status under the Code section the organization applied.

#### Final Letter(s)

FinalLetter\_82-3006115\_LIFELONGLEARNINGORGANIZATIONOFSANMARCOSTEX  
AS\_11062017.pdf ([https://apps.irs.gov/pub/efpostcard/dl/FinalLetter\\_82-3006115\\_LIFELONGLEARNINGORGANIZATIONOFSANMARCOSTEXAS\\_11062017.pdf](https://apps.irs.gov/pub/efpostcard/dl/FinalLetter_82-3006115_LIFELONGLEARNINGORGANIZATIONOFSANMARCOSTEXAS_11062017.pdf))

#### Form 990-N (e-Postcard)

Organizations who have filed a 990-N (e-Postcard) annual electronic notice. Most small organizations that receive less than \$50,000 fall into this category.

#### ^ Tax Year 2022 Form 990-N (e-Postcard)

Tax Period:  
2022 (09/01/2022-08/31/2023)

7/12/24, 1:23 PM

EIN:  
82-3006115

Organization Name (Doing Business as):  
LIFELONG LEARNING ORGANIZATION OF SAN MARCOS TEXAS

Mailing Address:  
1411 Madrid Trace  
San Marcos, TX 78666  
United States

Principal Officer's Name and Address:  
Marianne Reese  
1411 Madrid Trace  
San Marcos, TX 78666  
United States

Gross receipts not greater than:  
\$50,000

Organization has terminated:  
No

Website URL:  
[www.LLLsanmarcos.org](http://www.LLLsanmarcos.org)

✓ Tax Year 2021 Form 990-N (e-Postcard)

✓ Tax Year 2020 Form 990-N (e-Postcard)

✓ Tax Year 2019 Form 990-N (e-Postcard)

✓ Tax Year 2018 Form 990-N (e-Postcard)

✓ Tax Year 2017 Form 990-N (e-Postcard)

✓ Tax Year 2016 Form 990-N (e-Postcard)

### **Non-Discrimination Policy**

LifeLong Learning Organization of San Marcos Texas is an equal opportunity organization and will not allow discrimination based upon age, ethnicity, ancestry, gender, national origin, disability, race, size, religion, sexual orientation, socioeconomic background, or any other status prohibited by applicable law.

### **Audit**

Not applicable

### **Courses and Events Policies and Procedures**

Not available

## **LETTERS OF SUPPORT**

Presenter and participant: Dr. Steve Beebe  
Director, San Marcos Public Library: Diane Insley  
Former Advisory Council member and participant: Patty Margerison  
Major donor, presenter, and participant: Dr. Frank Podosek  
Director, Aging Forward Central Texas: Dr. Oren Renick

July 15, 2024

To the San Marcos Human Services Advisory Board:

I am pleased to write this letter with enthusiastic support of the grant request from LifeLong Learning (LLL) in San Marcos. I've been involved in LLL from its inception. I've attended several classes, had the joy of being a class presenter, and attended a wide variety of LLL events. Because it enhances community education, enrichment, and collaboration, LLL is most deserving of grant support from the San Marcos Human Services Advisory Board for several reasons.

**COMMUNITY EDUCATION:** As you will undoubtedly note from reviewing the courses offered in the past, LLL has enriched the lives of thousands of individuals interested in music, art, language, literature, history and a host of practical skills needed to navigate life. As I attend LLL classes, many offered at the San Marcos Library, students reflect a wide spectrum of backgrounds, ethnicities, cultures, and education levels. LLL is not a program only focused on those who already have an extensive educational background. Because most courses are either free or very low cost, courses are available to *everyone*.

**COMMUNITY ENRICHMENT:** LLL enriches the community profile of San Marcos. LLL is just the kind of program that organizations like the Chamber of Commerce can point to as one of the many reasons San Marcos has a national reputation for being a friendly city with opportunities for personal and professional development. In addition to offering a wide variety of courses that enrich the intellectual and aesthetic backgrounds of San Marcos citizens, it offers an outstanding forum for enhancing community identity.

**COMMUNITY COLLABORATION:** Instructors for LLL courses are drawn, as you might expect, from many Texas State University faculty members. In addition, instructors who don't have advanced degrees but have interesting backgrounds, experiences, and information to offer, serve as instructors. Through the collaborative talents of instructors drawn from the Central Texas area, LLL demonstrates how people come together to make our community an intellectually stimulating and welcoming place to live.

LLL is one of the gems of San Marcos. I hope you will support LLL's grant proposal to make this valuable and important community resource sparkle even brighter.

Sincerely yours,

Steven A. Beebe, Ph.D.  
Regents and University Distinguished Professor Emeritus  
Minnie Stevens Piper Professor



City of San Marcos  
Human Services Advisory Board  
630 E. Hopkins St.  
San Marcos, Texas 78666

July 17, 2024

RE: Statement of Support for Lifelong Learning

Please accept my enthusiastic support for the 501c3 LifeLong Learning funding proposal. Lifelong Learning and Marianne Reese have been providing exceptional educational opportunities to the San Marcos community for over ten years. When the class can be offered at no charge to the participants, the classes are held at the San Marcos Public Library and they are well-attended. LifeLong Learning has been able to offer a variety of courses allowing adult learners to meet new people, stimulate their minds, and learn new information and skills. With additional funding, LifeLong Learning will be able to offer more programs that will be free to the public, thus decreasing the barriers to participation.

According to the National Institutes of Health, three years after pandemic living, loneliness, isolation, and lack of social contact have led to a health decline among older adults. 1 in 3 people between ages 50 and 80 say they still sometimes or often experience these feelings, or sometimes go a week or longer without social contact with someone from outside their home. The percentages who currently feel lonely, isolated, or lacking contact were much higher among older adults who say their physical or mental health is fair or poor. Lifelong Learning is a nonprofit that seeks to improve the quality of life for our senior community. Belonging to a group and participating in educational courses can improve the cognitive ability of the participants. In another study by the National Institutes of Health, "an active and engaged lifestyle is supported as being beneficial for brain health." Participating in community-based activities improves general health and wellbeing and provides an enhanced quality of life, socialization, and functional abilities.

The San Marcos Public Library is able to offer in-kind assistance by providing MakerSpace and classroom space in support of the LifeLong Learning mission.

Sincerely,

*Diane Insley*

Diane Insley, Library Director

# San Marcos Public Library

625 East Hopkins • San Marcos, TX 78666 • 512/393-8200

211 Bunnyrun Lane  
San Marcos, Texas 78666  
July 22, 2024

Human Services Advisory Board  
City of San Marcos, TX 78666

Dear Board Members:

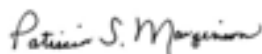
I am writing in support of the application by LifeLong Learning San Marcos for a Human Services Grant. I am confident that LifeLong Learning will use the grant to foster adult learning for seniors in San Marcos and the surrounding area as it has for the past ten years.

When LifeLong Learning was founded in 2014, I became a member of the Advisory Council, and manager of the organization's website for the first seven years. Creating the monthly calendar, I watched its early development blossom from a few courses to a plethora of courses, such as bowling, art, philosophy, sewing, bridge, geology, chemistry, music, and others. Marianne Reese, the Founder and Director, worked tirelessly to find venues, presenters, and teachers to accommodate our growth. During the Covid 19 pandemic, LifeLong Learning did not cease, but under Dr. Reese's direction, moved on-line to offer courses that drew learners from San Marcos and even other areas of the United States. As we have moved out of the pandemic, our local course offerings have resumed and expanded. In its ten years of service to seniors in our community LifeLong Learning has reached over 20,000 enrollees, involving 140 instructors and presenters.

During the past ten years, I have attended many LifeLong Learning classes, and I have witnessed the enjoyment and growth that seniors gain from their experiences with LifeLong Learning. Long-time community members and community newcomers meet around common interests, share the excitement of learning, and make new friendships. In my case, the organization's mission of enhancing the quality of life of San Marcos' seniors has certainly been achieved by providing a venue for me to make new friends and grow intellectually.

I have no doubt that, given its history and help from a Human Services Grant, LifeLong Learning will continue to grow and will provide no-cost/low-cost experiences which enrich the San Marcos community.

Sincerely,



Patricia Margerison  
pm07@txstate.edu

July 23, 2024

To the San Marcos Human Services Advisory Board:

I write this letter in support of the funding request made by the Life-Long Learning program (LLL).

I am a former educator (Professor of Earth and Planetary Sciences, Washington University in St. Louis). I firmly believe in the value of education as a lifetime process. Adult education is a cultural asset to the community because of its intrinsic worth but also benefits the individual by providing a basis for personal gratification and sometimes even fun.

I lived in Wimberley from 2010 to 2019. In this time, I first became familiar with LLL through its offerings at the San Marcos Public Library, and I have taken several of its courses. I also made the acquaintance of LLL's director, Ms. Marianne Reese; I have had several conversations with her about the program and future of LLL.

I now live far from San Marcos (in Florida). Nevertheless, I have followed LLL's program, and have taken a few of its online courses. In addition, I have enjoyed listening to some of its informative podcasts. This provides an indication of the attractiveness of LLL's offerings.

More broadly, LLL well satisfies the goals set out in its mission statement: To provide the citizens of San Marcos and its environs with accessible low- or no-cost experiences that will enhance their quality of life (and, incidentally, help them to become better citizens). LLL maintains a focus on accessibility for older adults, but its offerings have appeal for adults of any age.

At present, LLL offers "courses", as it has for some years now. In addition, it sponsors podcasts and free public lectures at the Library on topics of general "civics" interest. Also, some of its courses focus on "modern living" experiences (e.g. Line Dancing, Beer) that promote engagement along with education.

I have put my money where my mouth is. A couple of years ago, long after I had left the San Marcos area, I made a substantial financial contribution (from personal funds) to LLL. Ms. Reese has said that this was the largest single individual donation LLL has received, and that it has been an important factor in helping LLL satisfy its goal of providing low-cost/no-cost access to its offerings.

I was moved to make this donation because of the great value I think that such an institution adds to the cultural life of its community. Moreover, I perceive that LLL has been, and promises to continue to be, quite successful in achieving the goals set forth in its mission statement.

We, the general population of our society, are besieged by appeals from "worthy causes" for financial support. I feel that if we, as a society, are going to support any non-governmental organizations at all, they ought to be of the class that promises to advance the state of our society and enhance the experience of living in it. By this logic we should support LLL and its ilk at high priority.

Respectfully submitted,

Frank A. Podosek





*The rising STAR of Texas*

July 17, 2024

Human Services Board  
City of San Marcos  
San Marcos, TX 78666

Dear Human Services Board,

This letter is in support of the application for funding by Life Long Learning, Inc. The mission of LLL is to provide accessible, no-cost/low-cost experiences for San Marcos area older adults to explore, question, learn, and engage with others. LLL's track record of meeting its mission of providing meaningful continuing education experiences to older adults justifies funding its current request. Aging Forward Central Texas sought a partnership with LLL to address the health and wellness needs of older adults. Together, we are planning a program to reduce both social isolation and food insecurity.

Working with the San Marcos Public Housing Authority, we support the implementation of the HOPE Program of stocking, bagging, and delivering non-perishable food items to public housing residents. Teams of volunteers are engaged in carrying out this program to reduce food insecurity. LLL partners in this program and will deliver a companion nutrition course to HOPE recipients to gain new knowledge while reducing social isolation. This two-pronged approach should improve health and wellness while reducing food insecurity and social isolation. Participants will be surveyed to measure program effectiveness. Based on outcomes, there is the potential for national replication.

The initial nutrition course will be for six weeks to a maximum of 15 participants and repeated regularly. It may be provided to San Marcos residents at-large with a three-course cognate addressing health and wellness to supplement the nutrition course.

The Aging Forward Alliance is a national program of volunteer caregiving and lifelong learning. I serve as Chair of the Board of Trustees. Both the national program and Aging Forward Central Texas welcome LLL as a valued partner. Please consider favorably LLL's request for funding.

Sincerely,

Rev. Dr. Oren Renick  
Professor & Chair  
Board of Trustees, Aging Forward Alliance

SCHOOL OF HEALTH ADMINISTRATION

601 UNIVERSITY DRIVE | SAN MARCOS, TEXAS 78666-4684 | phone 512.245-3494 | fax 512.245.8712 | [WWW.HEALTH.TXSTATE.EDU/HA](http://WWW.HEALTH.TXSTATE.EDU/HA)

*Texas State University was founded in 1899.*

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