Dear members, friends and supporters.

Thank you, all, for being an essential part of OLLI @Berkeley’s learning community.

Whether you opened the door at Freight and Salvage in downtown Berkeley for a film, music, or history course, or clicked your mouse or tapped your tablet to participate in nearly one hundred groundbreaking courses and events online, you contributed to a stellar year of insight, exchange and learning.

If you answered our call to join a UC research project, you added important perspectives to a growing body of knowledge of how the university can embrace the older learner while strengthening its research mission to investigate the lifespan. In this arena, young and old are encountering their future selves and the wisdom of elders.

The success of this year was determined by our collective ability to adapt, to be flexible and resilient, and to take on the hard work of navigating Zoom technology to increase accessibility so that everyone could continue to learn safely.

We offered the university and members an opportunity to discuss some of the most pressing issues of the day. We contributed to the campus efforts to enfranchise alumni to bring them into the learning environment of campus and to remind them of the thrill of having a great rhetorical exchange or make a new friend.

A substantial number of the us have been together since OLLI @Berkeley’s founding 15 years ago. Our loyalty and commitment to one other and to the importance of learning, always, whatever the challenges, has proven our ingenuity as well as our stick-to-itiveness.

This year has also brought a great deal of reflection about how we, as individuals and as a community of learners, want to experience the future. How do we wish to engage and connect? How do we best celebrate the joys of lifelong learning with one another? These past few years have shaken all of us deeply and transformed the very essence of what it means to be together. All of us are doing the hard work of reorienting and recapturing what matters most. It’s a time of great discovery, and one I’m excited to explore with you in the coming months.

Once again, thank you for making this all possible with your engagement and contributions.

Susan Hoffman
Director, OLLI @Berkeley
BY THE NUMBERS

- **2,441 MEMBERS**
  - 2,799 in 2020-21

- **73 COURSES**
  - 63 in 2020-21

- **262 MEMBER CITIES**
  - 233 in 2020-21

- **96% SATISFIED**
  - According to annual survey

- **79,923 WEBSITE VISITORS**
  - 58,212 in 2020-21

- **26 SPEAKER EVENTS & TOWN HALLS**

- **$100,064 DONATIONS**
  - from generous members, friends and supporters
In 2021-22, we realized the hybrid future we had laid out in our strategic plan years earlier. We were thrilled to welcome back members — vaccinated, boosted, masked — to engage and connect with us and with one another in person while we continued to grow a robust online program.

**In the Classroom**

In 2021-22, we curated a roster of 73 courses that contextualized and illuminated the tumult and wonder of the world around us.

Our members dove into explorations of racism and European art, caught their breaths exploring sacred mountains around the world, sang joyfully with the Beatles and the Stones, grappled with ethical dilemmas. They probed Russia, cultural astronomy, film scores, the Kennedys. Every topic brought to life by Cal faculty and other distinguished scholars.

**Every Way for Everyone**

After months of planning and hoping, we were overjoyed to welcome members back to in-person classes at Freight & Salvage in downtown Berkeley and at the OLLI office just blocks away.

We also continued to offer the majority of our courses online — streamed live, and, in many instances, also recorded — to ensure we continue to deliver dynamic and convenient learning experiences for all of our members, near and far.
LEARNING

Speaker Events & Town Halls

From Berkeley Law School dean Erwin Chemerinsky discussing how the U.S. Supreme Court empowers police, to a panel examining the contentious ownership of truth, our speaker series and Town Hall gatherings offered members and the community opportunities to wrestle with some of the most critical issues of our time.

We dedicated the fall of 2021 to exploring different facets of the climate crisis, featuring figures at the forefront of their fields in research and policy, including Daniel Kammen, Ken Alex and John Battles.

We also continued our America’s Unfinished Work series which presents influential voices engaged in the examination and eradication of systemic racism to create a more humane, just and equal society. Speakers included Zach Norris of the Ella Baker Center for Human Rights and Emerson Sykes of the ACLU.

Dr. Deborah Gold, a retired infectious disease specialist, continued to provide our members with her invaluable expertise on the current state of the pandemic in four Q&A sessions.

Berkeley Talks

Over the years, many of our speaker events have been featured on Berkeley Talks, a Berkeley News podcast, that showcases important discussions and conversations taking place on campus. Six of our gatherings — each of which attracted hundreds registrants — were spotlighted in 2021-22, including presentations by Robert Full, professor of integrative biology, UC Berkeley, on bioinspired design; Abdi Soltani, executive director of the ACLU of Northern California, on voter suppression; Erica Bree Rosenblum, professor of global change biology, UC Berkeley, on finding hope for biodiversity; George Breslauer, a professor emeritus, UC Berkeley, and Yuriy Gorodnichenko, professor of economics, UC Berkeley, on Russia’s invasion of Ukraine; and Linda Rugg, Associate Vice Chancellor for Research, on Native American repatriation at Berkeley.
National Science Foundation Grant

We continued work on the National Science Foundation Grant from the NSF Program Advancing Informal STEM Learning (AISL). The research focus and title is “Investigating the Measurement of STEM Engagement and Advocacy in Older Adults.”

Initially awarded in the fall of 2019 as an 18-month-long grant to develop and validate outcome metrics used in informal older adult learning, the study period was extended due to the necessity to test the measures in an in-person learning experience, which was not possible during the height of the pandemic.

Following cognitive labs and pilot surveys for the measures, we held design workshops in the fall of 2021 and the spring of 2022 with our study partners — the Fung Fellowship and the Lawrence Hall of Science — in which OLLI members and Berkeley undergraduates came together to learn and apply design principles to real-life situations. The workshops were an in-person vehicle in which to test the study measures.

The research study is now planned to conclude by December 2022 following the final Advisory Board meeting and the production of the final report.

UCB Discovery Initiative

In the spring of 2022, we submitted a proposal to Berkeley’s Discovery Initiative, a multi-year campus-wide effort to transform undergraduate education through the elevation of immersive, engaged and inquiry-driving learning. Discovery also provides advice and mentoring to help increase self-actualization, the process by which an individual reaches his/her full potential.

We proposed developing and offering a course Coaching for Self-Actualization with the goals of helping students increase their personal agency, self-efficacy and resistance. We would do so by training older adults to provide individualized coaching services to help students address current academic and life challenges, and to provide a framework of empowerment they can drawn on in the future.

Our proposal was accepted and funded in spring 2022. We immediately set to work recruiting OLLI members, and, in a collaborative outreach with the Retirement Center, retired faculty and staff.

Launched in fall 2022, the course is a pilot and will undergo extensive evaluation to determine the possibility of scaling it for the 2023-24 academic year.

Collaborative Research Partnerships

We continued to support academic research conducted by campus and other UC partners by assisting with study recruitment when the research focuses on older adults.

Studies included:

- Moving Together (UCSF)
- Dr. George Brooks Metabolic Flexibility (UCB)
- Public Health Online Fitness (UCB)
- Impact of Online Learning (UCR and UCI)
Community

Alumni Outreach

In 2021-22, we continued to grow and nurture our connection and commitment to the Berkeley alumni community through a number of outreach endeavors.

In the winter of 2022, we worked in partnership with the Alumni Development and Engagement office to offer one of our most popular courses—Extreme Politics with professor Darren Zook—at no cost to 1,500 alumni who also enjoyed the opportunity to join him in two lively livestreamed conversations.

We also connected regularly (and digitally) with tens of thousands of alumni through the Chancellor's emails, Berkeley Online emails, affinity group newsletters, and direct OLLI email communications.

Member Meetups

Our Member Meetup program was launched in the fall of 2021 as a way to bring members together to explore shared interests, meet new people and find community over an array of lively topics. Members have gathered virtually to share book recommendations, learn the in’s and out’s of buying electric cars, talk sports, and more. Meetups are proposed and led by members, and have been a popular addition to our programming.

New Team Members

In December 2021, Patricia Carvalho joined us as our new Business and Operations Manager. Patricia arrived after a decade as Operations Director at Ashby Village, a non-profit organization serving elders in the East Bay.

In the fall of 2021, Sandra Bass, Executive Director & Associate Dean of the Public Service Center at UC Berkeley, assumed a vital role as our Diversity, Equity, Inclusion and Belonging advisor.

A Visit with Barbro Osher

We were delighted to welcome Barbro Osher to the OLLI offices in April 2022 to provide a day-long opportunity to connect with campus friends and colleagues, including Robert Strand, director of Berkeley’s new Nordic Center. Osher, Swedish Consul General in San Francisco and chair of the Bernard Osher Foundation and Barbro Osher Pro Suecia Foundation, was kind enough to introduce Strand in his OLLI talk, “Is the American Dream a Nordic Reality?” (Hint: Yes.)

A Space to Share and Learn

Founded in 2021 by longtime member and instructor Sara Orem, the Vital Aging group brings members together in community to discuss and reflect on issues of particular significance to older adults. Senior housing options, sleep, and solo aging, are just some of the many topics explored over the past few years.
In July 2021, OLLI’s university home (Summer Sessions, Study Abroad and Lifelong Learning) added a new unit — UC Berkeley Extension. We are now in the division known as SSAlleX headed by the Dean of Extended Education, Richard (Rick) Russo. With our new colleagues, we have been learning about the other departments and contributing to a common vision known within the division as One Berkeley.

Operating Budget

2021-2022 was both exhilarating and challenging. We plan our academic terms months in advance, and, like many, had envisioned a collective re-emergence made possible by the arrival of highly effective vaccines. However, new COVID variants and the understandable hesitancy of many members to gather in person again while simultaneously experiencing “Zoom fatigue”, frustrated our efforts to fully resume face-to-face learning and resulted in a 4.8% loss in membership dues and course fees.

Our commitment to rebuild our community by offering more courses — both online and in person — significantly increased our spending on faculty. Likewise, the resumption of venue costs, an initial investment toward the development of a new website, and equity raises for a number of staff resulted in an unusual operational deficit. We were able to cover this by drawing from reserves, which allowed us to continue offering quality programs and courses with the expectation that enrollment will recover over time.

Reserve Fund

Each year, the University requires us to bring in more money than we spend with excess dollars going into a reserve for precisely the kind of fiscal situation we faced.

Fortunately, our reserve fund had accumulated over the past four years to a sum of $225,000. This reserve allowed us to cover the operational deficit of $120,236 for the 2021-22 academic year and to start 2022-23 with a reserve fund of roughly $105,000.

Back in 2017, the University offered OLLI the opportunity to establish a Fund Functioning as an Endowment (FFE) when our reserves had grown to $399,000 over our first ten years. Such funds generate interest income and are a valued source of annual funding, but the minimum qualifying fund is $500,000. Thanks to generous gifts from key major OLLI donors, we were able to establish the FFE in the fall of 2017. Since its founding, the FFE has generated roughly $20,000 per year of interest income, which has been used to support our programs. Per an agreement with the university, the FFE principal could not be drawn down for the first five years — the fall of 2022, at the earliest.
We gratefully acknowledge the many members and friends who generously supported our annual fund between July 1, 2021 and June 30, 2022. Because of their belief in the work we do — and their desire to help us navigate through and beyond these difficult times — we raised $100,064.

Dean’s Circle
Gifts of $1,000 and above

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Campus Contributors

Several of our most committed donors have also made significant contributions to the campus community including transformative gifts to Berkeley’s Fiat Lux program and to the Center for Climate, Law and the Environment at Berkeley Law.

On behalf of UC Berkeley, thank you to Wendy & Mason Willrich, Jake Warner & Toni Iihara, and Marjorie & Mark Medress for your support of the Cal’s extraordinary students and programs.
We are grateful to the member volunteers who served on committees in 2021-22, providing us with their invaluable support and counsel.

**Advisory Research Team**
- **Research Associate:** Cheryl Brewster
- **Members:** Lorraine Midanik, Sara Orem, David Presti, Peter Ralston
- **Staff:** Susan Hoffman

The team identifies UC-based research opportunities for member participation, conducts inquiry projects, and explores ideas and issues to inform the curriculum or membership.

**Curriculum Committee**
- **Co-chairs:** Susan Chamberlain & Ann Peden
- **Members:** Amy Chung, Bill Neilson, Lucille Poskanzer, Linda Wing, Hugh Winig
- **Staff:** Susan Hoffman & Matt Shears

The Curriculum Committee reviews course proposals, meets with prospective faculty and advises on the curation of future academic terms.

**Member Services Committee**
- **Co-chairs:** Joan Greer & Jerry Kaminski
- **Members:** Hugh Livingston, Stella Livingston, Valerie Knepper, Nikki Maziasz, Susan Sperber
- **Staff:** Nancy Murr

The Member Services Committee works to build a strong sense of community and belonging through member-led activities & events.

**Development Committee**
- **Co-chairs:** Mark Medress & Wendy Willrich
- **Members:** Gerry Kaminski, Mike Maidenberg, Eileen Savel, Murray Schlussel
- **Staff:** Susan Hoffman & Nancy Murr

Development Committee sets fundraising goals and plans the annual fund campaign.

**Lafayette Planning Committee**
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- **Members:** Marty Aufhauser, John Daws, Tom Francis, Christina Janssen, Howard Janssen, Kathy Merchant, Hugh Winig
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The Lafayette Planning Committee provides important insights and outreach into Lafayette and neighboring communities.

Great thanks to our nearly 80 instructors and guest speakers for inspiring our members and community with their expertise and scholarship.

**Faculty**
- Alexandra D. Amati
- J B
- Michael Baker
- Amelia Barili
- Marcia Lynn Bauman
- Edwin Bernbaum
- George Breslauer
- Linda Carucci
- Letha Ch’ien
- Michael Chantler
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- Elena Sheygal
- Bill Smoot
- Matthew Specter
- Carlos Torres
- Richie Unterberger
- Kenneth Verosub
- Stephanie Wells
- Mina Witteman
- Darren Zook

**Speakers**
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- Tamim Ansary
- Sandra Bass
- John Battles
- George Breslauer
- Erwin Chemerinsky
- Deirdre English
- Amy Eva
- Michael Fox
- Robert Full
- Jack Glaser
- Deborah Gold
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- Steven Greenhouse
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- Daniel Kammen
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- Zach Norris
- Erica Bree Rosenblum
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