



Berkeley
UNIVERSITY OF CALIFORNIA



Annual Report
2016 – 2017

Growing Programs

2,540

MEMBERS WERE PART OF OLLI IN 2016 – 2017, A 15% increase from last year.

589

OLLI @BERKELEY MEMBERS LIVE EAST OF THE Caldecott Tunnel — a 17% increase from 2015 – 16.

6,678

REGISTRATIONS IN OLLI CLASSES SET A NEW record in 2016 – 2017.

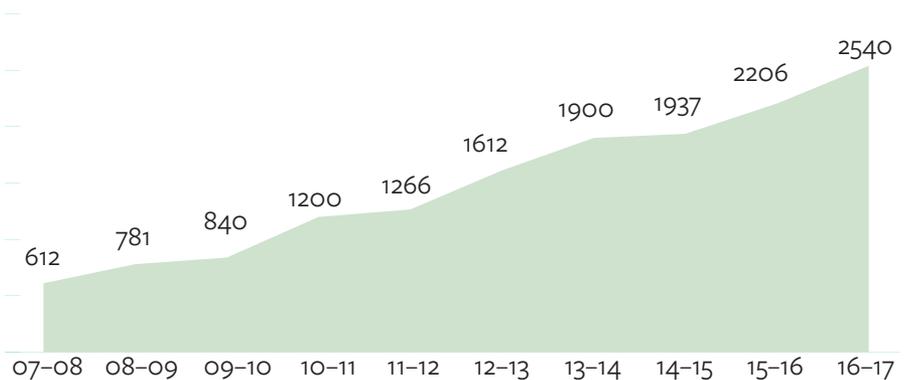
97%

OF OLLI MEMBERS WERE SATISFIED WITH OUR programs in our annual member survey.

\$146,076

OUR MEMBERS GAVE GENEROUSLY TO OLLI through the Annual Fund and gifts for special projects.

Membership Growth, 2007 – 2017



Director's Message

After a decade of rewarding and hard work, we — members, faculty and staff — have made OLLI @ Berkeley the flagship institution we envisioned.

Our courses are taught by expert faculty, artists, musicians and theoreticians on subjects of great urgency and import, both historical and contemporary. Our classes are filled with members eager to learn and experience, and always looking for ways to apply what we learn. And we have built a vibrant community beyond the classroom: with member-led activities including excursions, interest circles, and clubs, all part of an inviting lattice-work of activity and involvement.



Donors and volunteers have been the heart of OLLI @ Berkeley, from its inception in 2007 to what we see in this Annual Report.

Your generosity is remarkable.

Special thanks are in order for the donors who made exceptional gifts to help us set up a Fund Functioning as an Endowment. And in addition to what members gave OLLI, many of you also took the leadership to support worthy campus programs like undergraduate scholarships, Study Abroad, the Food Pantry, and International House.

Your drive to make the world a better place is inspiring. For each of you listed here as donors, thank you. For each of you who contributed in other ways with your volunteer leadership, thank you.

In the coming decade, we will continue to build upon our successes and keep OLLI responding to our dynamic aging and our ever-evolving world.

Susan Hoffman
Director

2016 – 2017 Highlights

OLLI @Berkeley Excellence in Teaching and Learning Award Given to Professor Alex Saragoza

On May 3, 2017, OLLI was honored to present the second annual OLLI at Berkeley Excellence in Teaching and Learning Award to Alex Saragoza, Professor Emeritus of Ethnic Studies. This award is given to a UC Berkeley faculty member who teaches at OLLI and who has demonstrated an ongoing commitment to engaged learning, both in the classroom and in the world outside the university.

Alex Saragoza has taught for OLLI since 2009. His courses have centered around Latin American and Spanish history as well as Latino culture in the United States. He has also led several travel study trips with OLLI to Spain and Cuba.

The son of farm workers, Professor Saragoza earned a B.A. at CSU Fresno, then an M.A. at Harvard. Following a stint teaching high school in Merced, he completed a Ph.D. in Latin American History at UC San Diego in 1986. He has taught at UC Berkeley since 1986.



Professor Emeritus Alex Saragoza and Director Susan Hoffman



Our Member Services Committee organized a number of events and excursions, including a Day at the Races (left) and a docent tour of the Oakland Museum of California followed by dinner at the food trucks (right).

The Fund Functioning as an Endowment: a Financial Milestone for OLLI

For the last several years, OLLI's financial reserve has been just below the minimum required for a Fund Functioning as an Endowment (FFE). As the 2016 – 2017 fiscal year closed, several of OLLI's most committed donors made exceptional gifts to the Annual Fund so that operating expenses could be met with Annual Fund revenues instead of course fees. This allowed us to transfer our reserve into an FFE, where it will become a source of interest income for OLLI. The estimated \$20,000 per year of interest income will be used in support of OLLI's programs, and the principal will remain available for exceptional expenses. Any future surpluses in our annual operating budget can be transferred into the FFE. This is an important milestone for OLLI, and we thank the donors who made it possible in time for our 10th anniversary!

From Motown to metafiction and from concertos to cosmology, our faculty brings an extraordinary breadth of knowledge and a wide range of perspectives into the classroom. We offered a record 96 courses in 2016 - 2017.



As always, OLLI volunteers are at the heart of our programs. Volunteers help in the classrooms, organize our events, and pitch in wherever needed to help OLLI run smoothly and ensure a welcoming atmosphere and a positive experience for all our members.

Build a legacy of learning

IRA rollover gifts and other planned gifts are an excellent way to make a meaningful contribution to a program you love and to help sustain our community of lifelong learners for many years to come. Visit planyourlegacy.berkeley.edu for helpful tips on making your gift, or contact the Office of Gift Planning at 800.200.0575 or ogp@berkeley.edu.

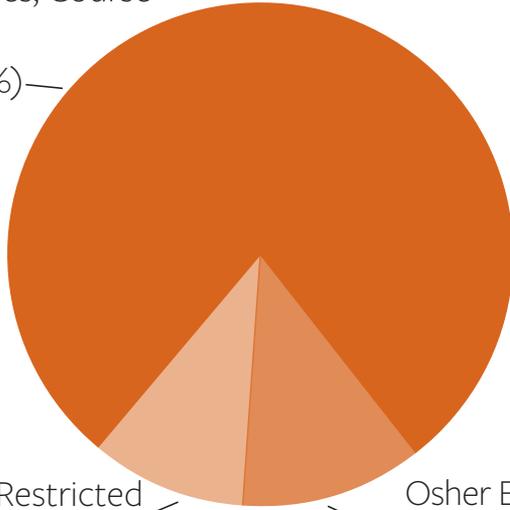
Financial Report 2016 – 2017

Revenues

\$1,245,107

Membership Dues, Course Fees and Travel

\$980,405 (78.7%)



Annual Fund & Restricted Gifts \$146,076 (11.7%)

Osher Endowment Revenues \$118,626 (9.6%)

The positive operating margin of \$102,426 was transferred to OLLI's Fund Functioning as an Endowment.

Committees

ADVISORY RESEARCH

TEAM

Cheryl Brewster*
Susan Hoffman*
Mitchell Breitweiser
Lorraine Midanik*
Sara Orem
Lauren Pearson
Peter Ralston

CURRICULUM

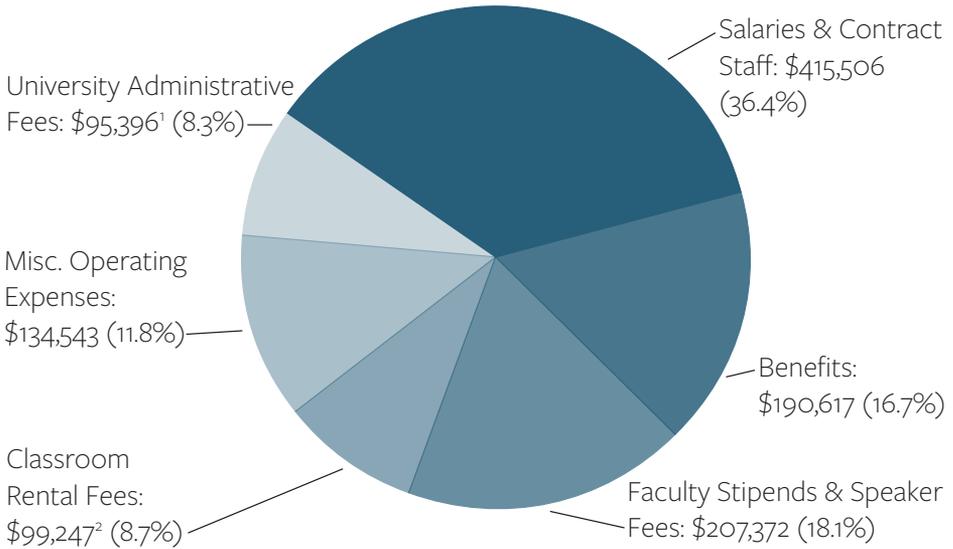
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Alan Fong
Deborah Goodman
Ilene Gordon
Susan Hoffman
Matt Shears
Ann Peden, Co-chair
Martin Pollard
Lucille Poskanzer
Nancy Spaeth
Ralph "Jake" Warner
Hugh Winig

DEVELOPMENT

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Betsey Beamish
Judith Bloom
Susan Hoffman
Christina Janssen
Howard Janssen
Jennifer Monahan*
Nikki Maziasz
Mark Medress, Co-chair*
Eileen Savel
Murray Schlusell
Ron Tauber
Wendy Willrich, Co-chair

Expenses

\$1,142,681



1. University fees help reduce overhead for office and classroom space as well as administrative support including Human Resources, Information Technology, gift processing, and design and printing services.
2. Includes \$47,780 in expenses incurred in 2016 - 17 for which payment was disbursed after June 30, 2017.

LAFAYETTE PLANNING

Gil Berkeley
 Sarah Blumenfeld, LLLCF
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 John Daws
 Susan Hoffman
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 Howard Janssen
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 Matt Shears
 Sharron Stringer
 Brad Wait
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MEMBER SERVICES

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 Joan Greer, Co-chair*
 Jerry Kaminski, Co-chair
 Gale Lederer
 Jennifer Monahan
 Nikki Maziasz
 Susan Sperber

* One co-chair from each committee served on the Strategic Planning committee, as did OLLI's Business and Operations Manager Lisa Hardy.

Annual Fund Donors

DEAN'S CIRCLE

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