



Berkeley
UNIVERSITY OF CALIFORNIA



Annual Report
2017 – 2018

By the Numbers

2,805

MEMBERS WERE PART OF OLLI IN 2017 – 2018, A 9.5% increase from last year.

101

COURSES WERE OFFERED IN 2017 – 2018, INCLUDING 15 in Lafayette.

7,364

ENROLLMENTS IN OLLI COURSES SET A NEW RECORD in 2018 – 2019.

38%

OF SURVEY RESPONDENTS TOOK CLASSES IN BOTH Berkeley and Lafayette; 53% took classes only in Berkeley and 9% only in Lafayette.

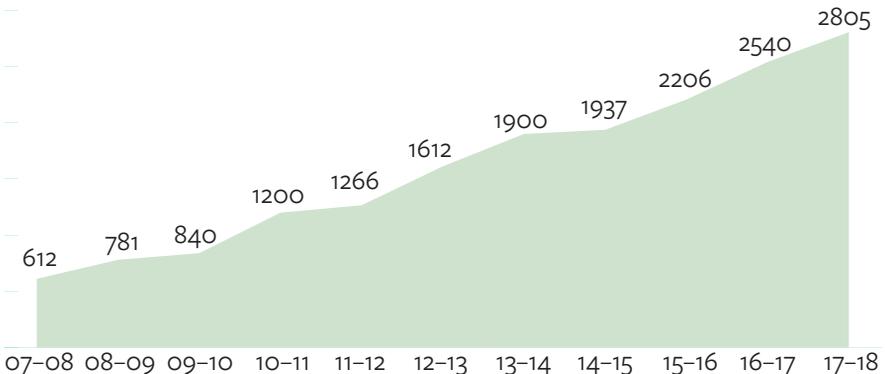
98%

OF OLLI MEMBERS WHO RESPONDED TO OUR ANNUAL survey were satisfied with our programs.

\$120,636

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

Membership Growth, 2007 – 2018



Director's Message

The record-setting numbers in this year's annual report give us occasion to reflect on the deeper dynamics underneath the "metrics." What alchemy generates the exchange of ideas between members and faculty? What contributes to our saying "yes" to those volunteer hours in committees or at events? What brings us to rally around an Annual Fund pitch?



The answer is personal and collective. We are exceptionally proud of what we have created together. We don't take it for granted because we know it is hard work. Whether it is expert faculty who show up with another revelatory presentation, or an exchange with another member that resonates — alike or different — with our own perspective, something quite remarkable takes place in these 101 courses and dozens, indeed hundreds, of peer-to-peer gatherings.

We sustain each other and OLLI. We build upon our relationship to the campus and we contribute to OLLI and Berkeley's future. It's our common legacy and our enduring belief in the power of learning and advancing a world of ideas.

Thank you for all of the contributions you have made this year to OLLI and to UC Berkeley. We are building a future where older adult learning and the contributions we make will be given their full value. It's going to take all of us, and more. I'm confident we will get there!

Susan Hoffman
Director

2017 – 2018 Highlights

Aging Research and Technology Innovation Summit

Drawing over 350 people from six UC campuses and as far away as Denmark, this summit highlighted the University of California's impact on improving the well-being of older adults. Summit presentations gave an overview of recent work in fields ranging from genetics to mechanical engineering to demography. One panel, "Training the Next Generation of Researchers / Engaging the Current Generation of Older Adults" was moderated by Vice Chancellor for Undergraduate Education Cathy Koshland and highlighted undergraduate research collaborations, including OLLI's work with the Fung Fellows.



In addition to OLLI, other summit organizers included the Center for Research and Education in Aging, Center for Information Technology Research in the Interest of Society and the Banatao Institute (CITRIS), Center for Technology and Aging, Fung Fellowship for Wellness and Technology Innovations, and the Center on the Economics and Demography of Aging.

GAIT Project: OLLI partners with Fung Fellowship

The Fung Fellowship pairs undergraduate students with community partners and industry professionals to design technology solutions to health and wellness challenges. Last fall, OLLI's Advisory Research Team reached out to the Fung Institute to propose a project for a wearable technology that would help people monitor and train their gait. The undergraduate students worked with 34 OLLI volunteers to learn what their priorities were, developed prototypes, then refined the prototypes based on feedback from OLLI members.



In January, OLLI organized a panel of scholars and activists to discuss a painting of "Custer's Last Stand" at the Downtown Oakland Senior Center.



In April, Chancellor Carol Christ gave a talk to OLLI members about "Berkeley's Future."

OLLI @Berkeley Excellence in Teaching and Learning Award Given to Darren Zook

On May 9, 2018, OLLI was honored to present the third annual OLLI @Berkeley Excellence in Teaching and Learning Award to Darren Zook, lecturer in Political Science and International and Area 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.

The seven courses that Darren has taught for OLLI since 2010 have all helped broaden members' understanding of world cultures and current issues.

The speakers who took the stage included colleagues, former students, and OLLI members. All of them spoke highly of Zook's encyclopedic knowledge, his humor, and his rapport with students.



Darren Zook with members Susan Sperber and Jake Warner

Our Member Services Committee organized events and excursions, including a trip to the Contemporary Jewish Museum to see an exhibit on Rube Goldberg.

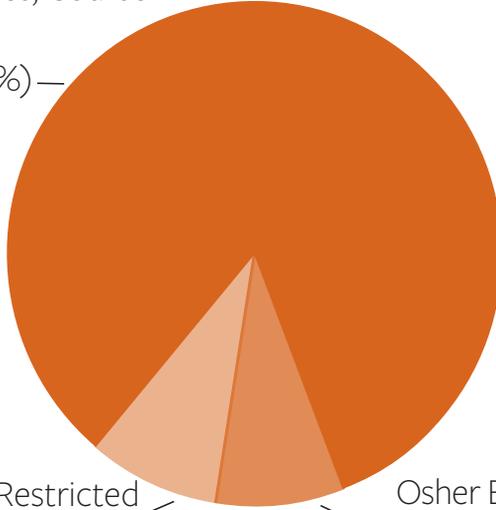


OLLI volunteers are at the heart of our programs. Volunteers help in the classrooms, organize our events, and pitch in wherever needed to help OLLI run smoothly and ensure a welcoming atmosphere and a positive experience for all our members.

Financial Report 2017 – 2018

Revenues \$1,295,158

Membership Dues, Course Fees and Travel
\$1,065,910 (82.3%)



Annual Fund & Restricted Gifts \$120,636 (9.3%)

Osher Endowment Revenues \$108,612 (8.4%)

OLLI's Fund Functioning as an Endowment: Year One

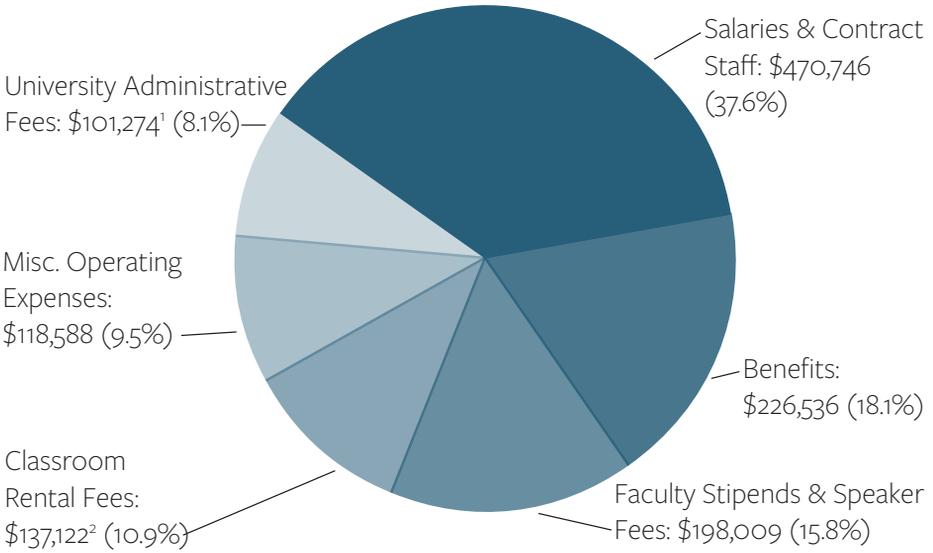
In 2016 – 2017, several of our most committed donors made exceptional gifts to the Annual Fund to bring OLLI's financial reserve to the minimum required for a Fund Functioning as an Endowment (FFE). The FFE was created at the beginning of the 2017 – 2018 fiscal year. Although no interest was disbursed in 2017 – 2018, the disbursement in 2018 – 2019 will be \$15,739. We are grateful to have this additional income in support of OLLI's programs, and we thank the donors who made the FFE possible.

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.

Expenses

\$1,252,275



1. University fees help reduce overhead including office and classroom space, administrative support, HR, IT, gift processing and design and printing services.
2. Does not include \$47,780 in expenses incurred in 2016 - 17 and recorded in the 2017 - 2018 Annual Report.

Your Gifts at Work

Annual Fund gifts support every aspect of OLLI's programs, including faculty salaries, classroom technology, and our fee assistance program. Your generous support of the Annual Fund also gives us more flexibility in choosing venues, including the California Jazz Conservatory and Berkeley City College. This summer we were able to move David Presti's "Consciousness" course to Berkeley City College, opening enrollment to an additional 130 students who would not otherwise have been able to take the class.



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