



Generous Donors

\$93,162 THE **ANNUAL FUND** ACHIEVED A record, with \$93,162 in gifts from 315 individuals and couples.



Faculty YOUR STRONG SUPPORT OF THE Annual Fund helped us increase faculty stipends: OLLI faculty receive \$2,000 per course in 2015 – 16, a 33% increase totaling \$45,000 for our 90 courses.

Classroom support ANNUAL FUND REVENUES helped support the hiring of a **contract staff person for Lafayette** and Berkeley courses, helping classes run more smoothly.



Scholarships WE HAD THE FINANCIAL flexibility to extend \$47,635 in fee assistance subsidies to 96 students.



Legacy Giving IN 2014 – 15, OLLI @BERKELEY received our first legacy commitment: Ralph “Jake” Warner and Toni Ihara contacted the UC Berkeley Office of Gift Planning to arrange for a gift to OLLI in their estate plan. We are honored by their long-term support of our programs and our mission of lifelong learning.

“I’ve never enjoyed learning as much as I do now that I’m going to OLLI.” — current member

Financial Statement

Membership Dues and Course Fees	\$780,627
University Administrative Full Cost Fee ²	\$(54,632)
Operating Expenses ¹	(\$801,777)
Unsubsidized Costs of OLLI	(\$75,782)
UC Space Allocation for Walnut St. and University Hall	(\$100,000)
Campus Shared Services (HR, IT, and Accounts Payable)	(\$16,600)
Total Costs for OLLI	(\$192,382)
UC Subsidy for Walnut St. and University Hall	\$100,000
SSALL Subsidy to OLLI for Campus Shared Services	\$16,600
Annual Fund Contributions	\$95,550
3% University Fee for Annual Fund Contributions ²	(\$2,388)
Net Surplus after Donations and Subsidies	\$17,380
OSHER Foundation Endowment Income	\$110,221
Net Contribution to OLLI Reserves for Strategic Initiatives³	\$127,601

1. Expense Detail		
Staff and Cal Student Salaries	\$311,386	38.8%
Contract Staff	\$52,394	6.5%
Benefits	\$127,871	15.9%
Faculty Stipends and Speaker Fees	\$135,287	16.8%
Misc. Operating Expenses	\$86,889	10.8%
Classroom Rental Fees	\$49,246	6.1%
Communications and Marketing	\$38,704	4.8%
Total Operating Expenses	\$801,777	100%

2. University Fees help support:
Reduced costs for design, print and mailing services
Reduced overhead for office and classroom space
Administrative support, including Human Resources, Information Technology, and SSALL support
Gift processing

3. The positive operating margin of \$127,601 will be used to support strategic initiatives, including classroom technology and the establishment of a 10% operating reserve.

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* Denotes participation in the Strategic Planning Committee, along with Howard Goodman and Michael Gordon.

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* Donations over \$100. All donations are listed on the OLLI website. Every effort has been made to avoid errors, misspellings and omissions. If your name was listed incorrectly or omitted, please accept our sincere apologies and contact us at berkeley_olli@berkeley.edu.

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OLLI @Berkeley creates and facilitates a public space for the community and campus to experience the joy and benefits of lifelong learning



Growing Programs

1,937 THE OLLI **MEMBERSHIP** REMAINED strong with 1,937 members in 2014 – 15.

81 OLLI @ BERKELEY OFFERED A RECORD 81 courses: 72 in Berkeley and 9 in Lafayette.

789 789 OLLI MEMBERS PARTICIPATED IN OUR strategic planning survey to help OLLI set organizational priorities for the next two years.

435 OLLI @BERKELEY MEMBERS LIVE EAST OF the Caldecott Tunnel — a 19% increase from 2013 – 14.