UC Berkeley OLLI 2026 Annual Report (Full Text Version)

Osher Lifelong Learning Institute at UC Berkeley

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Director's Message

By Susan Hoffman, Director, OLLI | Assistant Dean, Lifelong Learning

There are many ways to measure a year's accomplishments. We read it in the appreciation and thoughtful suggestions in member surveys. We hear it in the decibel level of a classroom before class, during, and almost always after. What captures your attention is the key to our collective success.

Yet accolades this year often came with a sigh. The headlines have created a headspin that makes it hard to find one's footing. How do we find our sense of urgency, and the energy to act on it?

I think this report holds an answer. We find it by learning together. Members looked to history for insight in numerous courses, including "Back to the Future" and "War, Race, and the Constitution: Lessons from the WWII Japanese American Incarceration." They heard Berkeley scholars examine democratic backsliding, the war in Ukraine and the future of the dollar. The goal was not more news but the depth and context that make clear thinking possible.

We also find it in each other. Nearly 400 people filled The Freight in March to sing anthems of freedom, justice and hope, and hundreds more joined a record number of field trips. Delight, it turns out, is its own form of resilience.

This year began with real challenges. New campus requirements put us in a deficit, and a proposed move to another building raised hard questions about maintaining our excellence and our accessibility. In May, as we prepared for the move, we learned it would not happen on schedule, and campus has since confirmed that we will stay at the Golden Bear Center. It is a sigh of relief, and surer footing, to keep our home of offices, classrooms, nearby parking and ample restrooms.

OLLI's place at Berkeley also grew. UC Berkeley joined the Age-Friendly University Global Network, an effort I was privileged to co-lead with Cary Sweeney of the Retirement Center. It affirms what our members show every day: older adults are contributors to the intellectual life of the university, not only learners.

We also said goodbye to Lucille Poskanzer, the founding member of OLLI, whose determination helped to persuade the campus to create this institute in 2007. As we approach our 20th year, her example reminds us that OLLI exists because members believed in it and fought for it. Thank you to our faculty, speakers, volunteers, donors and dedicated staff. Most of all, thank you for your curiosity. It is what keeps this community thriving, and what will carry us into our next twenty years.

By the Numbers (FY 2026 Highlights)

- **2,713 members** (including 643 new members)
- **98% satisfaction** according to 2026 annual member survey
- **113 courses** (in person, livestreamed and recorded)
- **293 cities** (member locations across the U.S.)
- **$108,502 gifts** (direct donations to Annual Fund and through singalong fundraising event)

Learning in Community

OLLI is a community of lifelong learners fiercely curious about the world. They are note-takers and hand-raisers, adventurers and wonderers — people who crave depth, clarity and context along with moments of delight and escape. In 2025-26, our courses and events helped them make sense of a complex, occasionally befuddling world, offering new ways to examine the past, probe the present and ponder what lies ahead.

Opening Eyes, Challenging Views

From explorations of hybrid warfare, economic justice, and the legacy of Martin Luther King, Jr., to memoir writing and the interconnection between biology and society, our more than 100 courses gave members new avenues to engage with the issues and ideas shaping our lives.

"Back to the Future: Lessons From American History" brought together historians and filmmakers, including best-selling author Adam Hochschild, to examine pivotal moments in the nation's past and their resonance

today. Looking to history for insight was also central to *"War, Race, and the Constitution: Lessons From the WWII Japanese American Incarceration"* with Professor Susan Kamei. In *"Global Lens: Documentary Films with a Wide-Angle Point of View,"* film programmer Karen Davis and Danish documentarian Niels-Ole Rasmussen led members on a sometimes jarring, always revealing journey through nonfiction filmmaking. And *"AI: Myths, Facts, and Fallacies,"* with Robert Todd, helped members sort through current research and expert analysis, then put ideas to the test with hands-on experiments.

Other courses offered a taste of California's singular role in the world. Professor Kathleen Moran explored the many facets of California noir and the state's foodways, while cookbook author Linda Carucci took members behind the scenes of acclaimed Bay Area restaurants.

Add in multiracial identities in literature, music from classical to punk, urban design tours, and more, and the result was a year of courses celebrating the depth and variety of the world around us.

Learning Your Way

Our classrooms brought these ideas to life in different ways. Hybrid learning offered the best of both worlds - the energy of gathering in person and the flexibility to join from anywhere, while video recordings of many classes let members learn on their own schedules.

Speakers in the Spotlight

In 2025-26, influential figures took to the OLLI stage to share their insights and scholarship with our members and campus community.

Speakers included renowned Berkeley economist Barry Eichengreen, who explored the past and future of the global dollar; Nobel Laureate Randy Schekman, who discussed how curiosity-driven research opens new possibilities for medicine; and Berkeley political scientists Paul Pierson and Eric Schickler, joined by Henry Brady, who examined democratic backsliding and prospects for restoring meaningful checks on executive power.

Other timely conversations included Berkeley scholars George Breslauer and Yuriy Gorodnichenko who examined the human and economic costs of Russia's war on Ukraine, Ukraine's economic resilience and prospects for postwar recovery; and nutrition scholar Marion Nestle and health equity advocate Marion Standish discussing the forces shaping our food system, from access to industry influence.

We also convened a town hall on democratic socialism in practice, bringing together Lenny Goldberg, Daren Fields, and Robert Strand, moderated by Berkeley's Darren Zook. They explored how democratic principles translate into public policy and how governments can advance shared prosperity.

Bravo! Showcasing the Arts

In early fall 2025, we presented a four-part San Francisco Opera Primer, led by Berkeley Chancellor Emerita Carol Christ and Ph.D. candidate Naniette Coleman. Together, they explored four works in the Opera's fall season: *Rigoletto*, *Dead Man Walking*, *Parsifal*, and *The Monkey King*. These standalone events delved into each opera's stories, themes and unforgettable characters, with guest speakers including acclaimed composer Huang Ruo and SF Opera General Director Matthew Shilvock.

We were also delighted to showcase two exceptional community arts organizations in back-to-back presentations about their upcoming seasons: Berkeley Rep's Artistic Director Johanna Pfaelzer and Cal Performances Executive and Artistic Director Jeremy Geffen.

Sneak Preview: A Special Event

Nearly 100 people (members and non-members) leapt at the chance for a "sneak preview" with popular "Diving into the Movies" instructor, Harry Chotiner. The mystery film was *The Day After*, the groundbreaking 1983 TV drama about nuclear war. Harry's lecture and the discussion that followed sparked deep conversation about the film's enduring impact.

OLLI Goes to the Movies

For the first time ever, OLLI partnered with the California Film Institute to offer a three-part series around the 48th annual Mill Valley Film Festival. Led by MVFF Senior Film Programmer Karen Davis, participants enjoyed a preview talk, a day of screenings at the Festival and a post-Festival discussion.

Sing Out! A Singalong: Songs of Freedom, Justice & Hope

In March, we hosted *Sing Out! A Singalong: Songs of Freedom, Justice & Hope* — a high-octane celebration of the anthems that defined a generation's fight for a better world. Led by the Quarry Persons (Joe Cadora, Carol Curtis, Pete Elman, and Lisa Goulder), the event drew nearly 400 people to The Freight in Berkeley to sing

dozens of classics, from *Blowin' in the Wind* to *We Shall Overcome*, enjoy inspiring backstories, and test their know-how with fun pop quizzes.

The event was moving and joyous, reminding singers young and old about the power of our collective voice. Roughly half the audience were not OLLI members and more than a few of those joined afterward. The event also raised $15,000.

Institutional Milestones

UC Berkeley Joins Age-Friendly University Global Network

In October 2025, Berkeley joined the Age-Friendly University (AFU) Global Network, an international community of higher education institutions working to make universities more inclusive of people at every stage of life. The recognition reflects Berkeley's commitment to lifelong learning, meaningful engagement and the contributions older adults make to campus and society. Susan Hoffman, Director of OLLI at UC Berkeley and Assistant Dean of Lifelong Learning, and Cary Sweeney, Director of the UC Berkeley Retirement Center, co-led the effort to secure membership, with invaluable help from OLLI member and research associate Cheryl Brewster. They worked with an advisory task force representing programs and research centers across campus, making this a genuinely university-wide initiative.

Remembering Lucille Poskanzer

We were deeply saddened by the passing of Lucille Poskanzer, one of OLLI @Berkeley's leading lights and fiercest champions. Lucille wasn't just a founding member of OLLI; she was *the* founding member — a woman whose gumption, humanity, generosity and fearless intellect galvanized a community of older learners and persuaded a campus administration to launch, in 2007, the OLLI that exists today.

Intergenerational Dialogues

We celebrated the sixth anniversary of *Words Over Time*, our intergenerational dialogue between Berkeley undergraduates and OLLI members discussing topics in the news. This year's conversations focused on the Constitution and the rule of law, and the separation of church and state.

Days of Discovery and Connection

Hundreds of OLLI members took part in more than two dozen field trips and socials in 2025-26 — a record

number of opportunities to connect and explore beyond the classroom. They discovered the hidden stories of Oakland's Chinatown, meeting with community leaders, including former Oakland mayor Jean Quan; visited Berkeley's iconic '60s landmarks; and traced the history of Berkeley's Latino community. They marveled at San Francisco's giant public art, learned about women who shaped the WWII home front at Rosie the Riveter National Historical Park, and explored San Francisco's WPA-era murals. Other outings included FDR's presidential yacht, the USS Potomac; Cal Memorial Stadium; the Treasure Island Museum; Julia Morgan's Berkeley City Club; and BAMPFA exhibits, from African American quilting traditions to the experimental art of Theresa Hak Kyung Cha.

Giving Back

Dozens of members rolled up their sleeves to put OLLI's community spirit into action, coming together to support the important work of Save The Bay and the Alameda County Community Food Bank.

Fiscal Year Overview (FY 2026)

Fiscal Year 2026 was a year of stabilization. Amid the Bay Area's continuing inflationary pressures, we worked to meet the needs of our staff, faculty, and members while building a strong, sustainable foundation for OLLI's future. Looking ahead, our greatest fiscal challenge is to maintain not only the quality of our courses but also the excellence of their delivery, whether in person, hybrid, livestreamed, or recorded.

Revenue

Our primary sources of income (membership dues, course fees, and our endowment) held steady this year. We were delighted to welcome 643 new members in 2025-26, and our retention rate improved as well. To broaden engagement and develop new sources of revenue, we launched two new programs: Best of OLLI, popular courses recorded a previous term, and the OLLI Travel Program. Together, they generated $29,063 in new revenue.

Expenses

We kept a close watch on costs throughout the year. In response to rising venue rental fees, we limited outside rentals to The Freight for the Fall and Winter terms. UC implemented a 3.2% system-wide salary increase for staff in AY 2025-26, and staff salaries and benefits rose accordingly. We reduced brochure mailing and increased social media spending, saving about 18% in the marketing budget.

Deficit

This year's deficit of $46,874 was driven largely (80%) by one-time, unanticipated expenses: a multi-year campus reconciliation of member dues and fee refunds, and a required update to website security infrastructure. Excluding these non-recurring costs, our operating results were in line with our targets.

The Annual Fund

The Annual Fund is essential to OLLI's financial health. It helps bridge the gap between what membership dues and course fees cover and the full cost of delivering an exceptional program. Where two donor families once provided 40% of all Annual Fund gifts, support now comes from a much wider circle of donors. We have also launched an annual fundraising event that brings our community together in support of OLLI's mission.

Our Ongoing Commitments

At the heart of OLLI is our belief that learning should be accessible to everyone. That is why we remain committed to our Fee Assistance Program, which supports more than 100 members each year and represents approximately $40,000 in forgone revenue. We also continue to offer our Premium Membership, which allows members to take more than 50 courses at no additional cost, making lifelong learning more affordable and rewarding.

Financial Breakdown Charts (FY 2026)

Revenue: Total $1,541,282

Revenue Source	Amount	Percentage
Course Fees & Membership Dues	$1,114,783	72.3%
OLLI Rent & Program Support	$157,116	10.2%

Revenue Source	Amount	Percentage
Osher Foundation Endowment	$127,926	8.3%
Annual Fund	$108,502	7.0%
FFE Interest	N/A	1.8%
Travel Program	N/A	0.4%

Expenses: Total $1,588,156

Expense Category	Amount	Percentage
Administrative & Student Salaries	$664,183	41.8%
Staff & Faculty Benefits	$317,043	20.0%
Faculty Salaries & Speaker Fees	$176,196	11.1%
GBC Rent	$152,184	9.6%
University Administrative Fees	$123,130	7.8%

Expense Category	Amount	Percentage
Misc Operating Costs	$109,140	6.9%
UC Refund Reconciliation	N/A	1.9%
Venue Rental	N/A	1.1%

Donor Acknowledgments (Annual Fund)

We gratefully acknowledge the members and friends listed here who generously supported our Annual Fund between July 1, 2025, and June 30, 2026, as well as the roughly 400 supporters who participated in our fundraising event, "Sing Out! A Singalong: Songs of Freedom, Justice and Hope."

Golden Bears (Gifts of $2,000 and above)

Deborah Friedman | Alex Friedman
Richard L. Fuller M.B.A. '71
Cheryl D'Accardo Hornberger B.A. '73
Toni L. Ihara B.A. '68 | Jake Warner J.D. '66
Christina Janssen P'92
Paul B. Lim B.A. '71
Katherine Maidenberg | Michael Maidenberg
Marjorie Medress *In memory of Mark Medress*
Sara Orem | Murray Schlussel
Ellen J. Pelissero
Diane Plank M.B.A. '83

Dean's Circle (Gifts of $1,000–$1,999)

Margaret Barbee

Mari E. Campbell | Gary R. Campbell

Amy T. Chung B.A. '75

Kate Funk | Daniel Funk

Edith Gladstone B.A. '61, M.A. '66

Terri D. Hearsh B.A. '69, M.A. '70, M.B.A. '80

Jeffrey L. Jacobs

Michael P. Meyer B.S. '74

M. Brian Murphy M.A. '68, Ph.D. '76 | Susan E. Hoffman *In honor of Lucille B. Poskanzer*

Karen L. Nelson M.S. '67 | Gregory V. Nelson Ph.D. '68

Margaret S. Race Ph.D. '79

Deborah Jean Reiling B.A.'78, M.L.S. '80

Diane A. Tokugawa B.A. '77, M.P.H. '78 | Alan D. Gould B.A. '71

Gifts of $250–$999

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Gifts up to $249

Anonymous (9), Susan J. Adler B.A. '75, Carole C. Allen, George Anderson, Leslie Armistead, Linda Dow | James Asher Morgenstern, Martin R. Aufhauser B.S. '63, Alton G. Avilla, Suzanne J. Awalt D.S.W. '82 | Roy W. Awalt, Gary E. Bacher B.S. '65 | Carole Anne Bacher, Susan R. Baskin B.A. '65 | Barry R. Baskin B.A. '64, Eric H. Benson M.B.A. '74 | Carol Benson, Dana J. Bergen M.S. '89, Edwin M. Bernbaum M.A. '80, Ph.D. '85 |

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Faculty, Speakers and Class Guests

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Wiscombe, Mina Witteman, Dariush Zahedi, Darren Zook.

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Roger Allen, Kim Ariana, Liana Berube, Henry Brady, George Breslauer, Joe Cadora, Bruce Cain, Carol Curtis, Susan Daniels, Frances Dinkelspiel, Howard Dratch, Barry Eichengreen, Barbara Epstein, Daren Fields, Jeremy Geffen, Deborah Gold, Lenny Goldberg, Richard Goldsmith, Yuriy Gorodnichenko, Lisa Goulder, Michael Graham, Susan Halpern, Charles Halpern, Adam Hochschild, Julene Johnson, Alan Karras, Dorothy Lazard, Bob Lindfors, John Markoff, Dave Martin, Marion Nestle, Raymond Neutra, Stephanie Ng, Erik Peper, Paul Pierson, Sister Helen Prejean, Evan Price, Peter Richardson, Huang Ruo, Randy Schekman, Eric Schickler, Barry Schwartz, Chris Shepherd, Matthew Shilvock, MaryAnn Smart, Marion Standish, Adam Štech, Kay Stern, Robert Strand, Laura Vasilyeva, Steven Vogel, Richard Walker.

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