The past 15 months have brought great change, challenges, and opportunities at Sonoma State University’s Osher Lifelong Learning Institute. It was with great sadness that we lost our founding father, benefactor, and mentor, Ed Stolman, in December of 2012. His development of the program at this University and support of other Osher Lifelong Learning Institutes throughout the nation is a testament to his enduring belief that learning is a lifelong endeavor.

The following are highlights from our program beginning in September 2011 to this past December 2012.

Entering our 11th year at Sonoma State University, OLLI classes continued to be held three times a year with an additional music appreciation summer program. With the completion of the Green Music Center on campus, OLLI plans for a future filled with collaboration with this remarkable facility and all it has to offer to our student population. Several of our students, including our Interim Executive Director, Alison Marks, attended the Opening Gala on September 9, 2012.

We continued to work collectively with our satellite campuses in Oakmont and Sonoma. However, at the end of Spring 2012, it was decided by the School of Extended Education and the OLLI Advisory Board to close our campus in Sonoma at the Vintage House, due to chronic low enrollment.

In the fall of 2012 we opened a satellite program in the town of Healdsburg for north county residents. Our inaugural session was a resounding success, with an enrollment of over 250 individual students.

Class enhancements activities have increased due in large part to the efforts of our OLLI Ambassadors Chairperson, Barbara Mackenzie. Classes have taken trips to the Oakland Museum to view local Bay Area artists and gone to the Di Rosa Preserve in Napa. A Science Club was launched in the fall of 2012 by OLLI instructor and student Dr. Phil Harriman, to great success, with the students visiting the Bodega Marine Lab and also the local water treatment plant. Future enhancements are planned that will include our growing tri-campus population.

Staff changes for this time period include the Executive Director, Julie Barnes, taking a management position in the School of Science and Technology on campus and the assignment of Alison Marks as the Interim Director of OLLI at SSU.

Our goals for the upcoming year include using surveys and other tools to provide more dynamic curriculum to our diverse audience, revisiting our fee structure, building a stronger tri-campus community, exploring giving opportunities, and establishing and maintaining relationships with new and old community partners.

2013 is our opportunity to build upon the wonderful legacy that Ed Stolman started. We look forward to the future of lifelong learning at Sonoma State University and beyond.

Mark Merickel
Dean of the School of Extended and International Education
Sonoma State University, 1801 E. Cotati Avenue, Rohnert Park, CA 94928
707-664-2394 • mark.merickel@sonoma.edu

Please note: This annual report also includes information for Fall 2012, per discussion with the Osher Foundation
58 students participated in the OLLI Summer 2011 Music Series on the SSU campus.

A total of 576 individual OLLI students from three campuses participated in 13 courses occupying 849 seats in the Fall of 2011.

In the Winter 2012, 645 individual students occupied 1,046 seats (13 courses).

Spring 2012, 584 individual students occupied 973 seats (12 courses).

Fall 2012, 782 individual students occupied 1306 seats (14 courses).

Total individual students for Fall, Winter & Spring: 1,704

Fundraising efforts: $50,029

Scholarships: 49 individuals

Course offered: 53

Endowment Earnings and SSU Support $100,000

Since many students take more than one class per session, the Enrollment Charts reflect the total number of individual students (blue bar) and the total number of classroom seats (purple bar) for each of the (3) OLLI campuses for Fall 2011 through Fall 2012.
OSHER ENDOWMENT UPDATE

As of June 30, 2012, the OLLI endowment at market value was $2,107,971, which represents a little over 7% of SSUAF's total Pooled Endowment.

This compares to a value of $2,172,780 at 6/30/11 and a value of $2,088,002 when the OLLI endowment was first moved into the Pool on November 30, 2010. The endowment as a whole posted an investment loss of around 4% in FY 2011-2012.

OLLI at SSU MEMBERSHIP UPDATE

Students have three membership options based on number of registered classes. The students can attend class at any OLLI at SSU location.

Benefits include course enhancements, library membership, and a Sea-Wolf Card, which is the official identification card of SSU. The card identifies OLLI students as a student of Sonoma State, and entitles them to other privileges and uses on campus.
## Funding and Expenses Fall 2011-Summer 2012

### Funding:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Fees</td>
<td>$205,743</td>
</tr>
<tr>
<td>Less: SSU/CSU Overhead @ 25%</td>
<td>$51,436</td>
</tr>
<tr>
<td>Net Revenue from Fees</td>
<td>$154,307</td>
</tr>
<tr>
<td>Campus Fees</td>
<td>$12,110</td>
</tr>
<tr>
<td>Transfer from Foundation - Donations</td>
<td>$69,837</td>
</tr>
<tr>
<td>Endowment Funding</td>
<td>$100,000</td>
</tr>
<tr>
<td><strong>Total Funding</strong></td>
<td><strong>$336,254</strong></td>
</tr>
</tbody>
</table>

### Expenses:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty</td>
<td>$84,480</td>
</tr>
<tr>
<td>Oakmont Coordination &amp; AV Support</td>
<td>$9,600</td>
</tr>
<tr>
<td>Sonoma Vintage House Rental</td>
<td>$6,600</td>
</tr>
<tr>
<td>Staffing &amp; Benefits</td>
<td>$138,042</td>
</tr>
<tr>
<td>Marketing</td>
<td>$13,890</td>
</tr>
<tr>
<td>Operating Expenses:</td>
<td></td>
</tr>
<tr>
<td>Parking</td>
<td>$3,031</td>
</tr>
<tr>
<td>Classroom rentals</td>
<td>$37,885</td>
</tr>
<tr>
<td>Catering</td>
<td>$7,855</td>
</tr>
<tr>
<td>Duplication</td>
<td>$9,457</td>
</tr>
<tr>
<td>Travel</td>
<td>$512</td>
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<tr>
<td>Supplies</td>
<td>$2,681</td>
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<tr>
<td>Non-contractual services</td>
<td>$6,597</td>
</tr>
<tr>
<td>Waived fees and scholarships</td>
<td>$4,000</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$324,630</strong></td>
</tr>
</tbody>
</table>
Troy and Kathy Sowers are completing their 2-year term as Co-Chairs of the Oakmont Lifelong Learning Committee. This committee serves OLLI students at Oakmont by helping to select presenters and topics of interest to Oakmont OLLI students.

Kathy received her BA in Management from SSU. During her work career she had responsibilities in areas such as human resources, budget, and employee training. She served on the Board of Directors for Redwood Credit Union for 26 years. Since 2008, Kathy has been writing publicity and photographing OLLI events for publication in the Oakmont News. Troy retired from the USCG (Leadership and Management School). He was the Staff Development Manager for North American Mortgage Company for 13 years. Troy has a Masters Degree from George Washington University in Adult Education and Human Development. He was an Adjunct Faculty member at SRJC and also taught at SSU. As Co-Chairs since January 2010, they have been active in SSU/OLLI committees supporting our OLLI initiatives. They both will continue to serve on the Oakmont Lifelong Learning Committee.

Anne and Jay Cobb bring to positions of Co-Chairs of Lifelong Learning at Oakmont extensive professional administrative backgrounds in education, collectively including K-12, community college, and university service. Prior to moving to Oakmont from the Monterey Peninsula in 2001, they owned Cobb Educational Services and provided consulting services to Monterey County Office of Education, school districts, community colleges, and CSU, Monterey Bay.

Anne served as Human Resources Director at Monterey Peninsula College for 20 years, Interim Personnel Director at Cabrillo College and 2 terms as Interim Academic Personnel Director at CSU, Monterey Bay. Jay’s professional career included 35 years in Pacific Grove Unified School District, serving as teacher, principal and Superintendent of School and 2 years as Interim Director of the Teacher Education Program at California State University, Monterey Bay. Jay currently serves as a Trustee on the Kenwood School District Board of Education. Anne previously served as OLLI at Oakmont Co-Chair in 2008 and 2009 and has been a member of the Lifelong Learning Committee at Oakmont since 2006. Jay has served as a volunteer audio visual technician since 2007 and is a member of the Lifelong Learning Committee.

What will add to our already splendid OLLI courses...more field trips, movies and videos...other ideas? How can we spread the word about OLLI...by speaking at service clubs, getting publicity in newsletters and flyers...other ideas? How can the OLLI experience be even better......more volunteer greeters and helpers, more campus tours...other ideas?

These are the questions being considered and acted upon by our newly created Ambassadors Subcommittee, headed by Barbara Mackenzie. Barbara, a seven year OLLI student, will also be the liaison to the OLLI Advisory Board, representing the Ambassadors and reporting on their activities.

After working for more than 25 years in local health care management, Barbara thought she would “try” a few OLLI courses in the Spring of 2005, and was instantly smitten. Since then, she has signed up for “too many” courses because she doesn’t want to miss anything! She has found that OLLI has opened some amazing doors, not only to advanced learning, but also to experiences such as serving as a Teaching Assistant in the SSU Psychology Department (ask her about “synchronicity”!), volunteer naturalist training and leading school tours at the University’s Fairfield Osborn Preserve, making some wonderful new friends, attending many campus shows, lectures and events, and hanging out in the fantastic Schulz Library as a proud ID card-carrying student!

Barbara wears her enthusiasm for OLLI and SSU “on her sleeve” and has been found to strike up conversations with strangers and to email old friends to spread the word. Her other activities include serving on the St. Joseph Health System Hospice Advisory Board, and the Friends of the Rohnert Park/Cotati Library Advisory Board, where she also writes the newsletter. She and her husband Jake, Rohnert Park’s current Mayor and long time Councilmember, are active in many civic and community events. They love exploring new parks and cities, and spoil the many cats and dogs that have adopted them over the years.

Barbara welcomes your thoughts, comments, and ideas, and looks forward to this opportunity to work with the other Ambassadors in further enhancing our wonderful OLLI program.
2011-2012 BOARD MEMBERS AND COMMITTEES

ADVISORY BOARD

Les Adler
Fran Claggett
Jay and Anne Cobb
Connie Codding
Kip Cutting, Co-Chair
Deborah Eid
Robert Gilchrist

Jeanne Johnson
Dan Lanahan
Barbara Mackenzie
Mike Marovich
Bob Santos
Ed Stolman, Co-Chair

BUDGET AND FINANCE COMMITTEE

Gale Brownell
Kip Cutting
Mike Marovich, Chair
Peter Rooney

Bob Santos
Troy Sower
Robert Rosen

CURRICULUM COMMITTEE

Les Adler
Ginny Benson
Fran Claggett, Chair
Jay and Anne Cobb

Kip Cutting
Chris O’Sullivan
Bob Santos

OLLI AMBASSADORS (SSU campus volunteers)

Berni Altman
Barbara Brooks
Sue Foley
Juliana Hoewing
Patricia Kavanaugh

Joanna Lapinski
Barbara Mackenzie, Chair
Berkeley Malm
Ola Talamantes
Sher Lifelong Learning provides opportunities for expanding our minds, exploring topics we never thought we’d be interested in, having stimulating conversations with our fellow members, enjoying the presentations of wonderful instructors, and learning for the joy of it.

FALL 2011 OLLI at SSU – CAMPUS
- From Buffoon to Philosopher King: The Many Faces of Abraham Lincoln
- Franklin Delano Roosevelt
- Introduction to World Music: Ethnomusicology as a Field of Study
- Medical Lecture Series: Healthy Aging
- Chocolate Confidential: 3,000 Years of Chocolate History
- Memoir Writing
- Understanding Culture and Tradition: Comparing Customs Around the World
- Tibet: Gateway to Heaven

FALL 2011 OLLI at SSU – OAKMONT
- Terrorism, Political Violence and the Law
- Music and Meaning in the Movies
- To Your Health: Well-Being Through Ancient Chinese Traditions

FALL 2011 OLLI at SSU – VINTAGE HOUSE
- Legendary Trials of the 20th Century
- The Golden Age of Radio in America

WINTER 2012 OLLI at SSU – CAMPUS
- The Chemistry of Creativity
- Impressionism and Beyond
- I Hear America Singing
- Civil War Lecture Series
- Great Caesar’s Ghost/Italy
- Wisdom Years
- Music and Meaning in the Movies
- East Meets West, West Meets East

WINTER 2012 OLLI at SSU – OAKMONT
- Yiddish Musical Theatre
- Shady Characters
- The Stuart Dynasty

WINTER 2012 OLLI at SSU – VINTAGE HOUSE
- Muses in Their Own Right
- Bobbed Hair and Model T’s

SPRING 2012 OLLI at SSU – CAMPUS
- Dream Work
- Alfred Hitchcock and the British Cinema
- Humankind, Biology, and Culture
- The Sustainability Revolution
- From Monkeys to Pandas
- Apocalypse 2012
- The Hero’s Journey
- Shanghai and the New China

SPRING 2012 OLLI at SSU – OAKMONT
- Exploring Opera
- The Many Faces of Abraham Lincoln
- The United States and Iran in Transition

SPRING 2012 OLLI at SSU – VINTAGE HOUSE
- Shady Characters
- The Stuart Dynasty

SUMMER 2012 OLLI AT SSU
Summer with the Symphony
July 10, 12, 17 and 19, 2012

FALL 2012 OLLI at SSU – CAMPUS
- Now the News: Broadcast Journalism in America
- The Stuart Dynasty Bit Players
- Paris Through the Ages
- Medical Lecture Series: The Santa Rosa Family Medicine Residency Program
- Thomas Jefferson’s Vision and the Early American Republic
- The Russian Expansion into California
- 2012: The Politics of Presidential Elections

FALL 2012 OLLI at SSU – OAKMONT
- Impressionism and Beyond
- Monkeys, Fossils, and Mother Nature
- Remembering the Home Front: 1942-1945

FALL 2012 OLLI at SSU – HEALDSBURG
- FDR at War
- The 21st Century Brain: an Ever Expanding Frontier
- Muses in Their Own Right

www.sonoma.edu/exed/olli