Over the years OLLI at DU has established itself as a model for excellence in lifelong learning. National recognition of OLLI at DU stems from the commitment you have all made to strengthen our local communities through intellectual exploration. As many of you have mentioned to me, I hope that as OLLI continues to expand its programming to new sights it does so with an intentionality of cultivating opportunities to attract individuals who will bring the richness of diverse perspectives and life experiences. This, I believe, will elevate OLLI to even greater heights.

Michael McGuire, Dean
University College at the University of Denver
We are delighted to submit the OLLI at DU 2017-2018 Annual Report to you, our amazing and resilient members. It is through you that we all are able to enjoy the continued success of the Osher Lifelong Learning Institute at the University of Denver...an institute that supports the continued enjoyment of learning and community.

Our dedication and commitment to excellence and transparency continues as it has for many years. It is our responsibility to you, the members, to ensure the progress and financial stability of this truly incredible organization.

This past year is best characterized as a year of huge leaps forward while enduring the dramatic losses - all in the midst of the continued controversy and division in the world at large. This year we saw the loss of our long-time Central ‘home’, Central Christian Church and the launch of our long awaited online registration process; we saw the loss of some incredible contributors and the launch of two new sites, OLLI-on-Campus and OLLI East. Through it all, we continued with an expansion of our robust course offering with 475 classes offered by our wonderful facilitators and instructors. These were offered to a very healthy and consistent membership of 2849 unduplicated members. We added a Wellness Symposium and the ability to join a research project to our WellAware offerings as over 115 members registered for our various hiking, biking and snowshoeing events. While our WorldView Mexico program offered a wide variety of classes on Mexico and a total of three trips to some of the different areas of our neighbor country, Mexico. And our partnering with the various aspects of the University of Denver has offered OLLI at DU members several new opportunities. We anticipate this connection to continue to provide additional unique learning experiences of interest to you, our members.

With the continued support of you our members and of the Osher Foundation, we continue to venture further afield as we look to launch additional sites in the Denver metro area not currently serviced by our five OLLI at DU sites. The expansion for this coming year will be into the Boulder area. If you have friends in Boulder who are not currently attending an OLLI at DU site and who love learning, you can let them know of the coming launch of OLLI Boulder in the winter term of this coming year. Other than that launch, we intend a rather quiet year as the dust settles and refinement continues on our many initiatives of this past year.

Thank you each for your support, encouragement and assistance as I and your very engaged and committed staff continue to strive to create a dynamic experience in which you can explore and enjoy the learning journey.

Barbe Ratcliffe, Executive Director
OLLI at DU
About The Bernard Osher Foundation

The Bernard Osher Foundation is a 40-year-old philanthropic organization headquartered in San Francisco that supports higher education and the arts. The Foundation supports a national network of lifelong learning programs for seasoned adults, the Osher Lifelong Learning Institutes, which currently operate on the campuses of 121 institutions of higher education from Maine to Alaska and Hawaii. The Foundation also provides post-secondary scholarship funding to colleges and universities across the nation, with special attention to reentry students. It also benefits programs in integrative medicine in the United States and Sweden, including centers at the University of California, San Francisco; Harvard Medical School and Brigham and Women’s Hospital in Boston; the Karolinska Institute in Stockholm, Sweden; Northwestern University; Vanderbilt University; the University of Miami; and the University of Washington. Grants to select cultural and arts organizations are made in the San Francisco Bay Area and the State of Maine.

Bernard Osher, Founder and Treasurer

Bernard Osher, a respected businessman and community leader, started The Bernard Osher Foundation in 1977 which seeks to improve quality of life through support for higher education and the arts. A native of Biddeford, Maine and a graduate of Bowdoin College, Osher has pursued a successful career in business, beginning with the management of his family’s hardware and plumbing supplies store in Maine and continuing with work at Oppenheimer & Company in New York before moving to California. There he became a founding director of World Savings, the second largest savings institution in the United States when it was purchased by the Wachovia Corporation in 2006. A collector of American paintings of the mid-19th to the mid-20th centuries, Osher purchased the fine art auction house of Butterfield & Butterfield in 1970 and oversaw its growth to become the fourth largest auction house in the world. In 1999, he sold the company to eBay. Bernard Osher has been affiliated with a number of philanthropic and non-profit boards and currently serves as vice-chair of the American Himalayan Foundation. He is the recipient of numerous honorary degrees and is a Fellow of the American Academy of Arts and Sciences (Class of 2009). He also is a serious student of opera and an ardent fly fisherman.
Barbro Osher, Chairman of the Board

Barbro Osher is Honorary Consul General of Sweden in California. For many years, she was owner and publisher of Vestkusten, one of the few Swedish-American newspapers in the United States, established in 1886 as a source of news from Sweden on politics, business, and sports as well as information on the active Swedish-American community in the West. A native of Stockholm and a graduate of Stockholm University with a degree in languages and political science, Osher pursued a career in publishing and advertising in Sweden before moving to the United States in the early 1980s. Her first visit to America in 1962 was to Maine where she participated as a student in the Experiment in International Living program. Over the years, she has represented both the Royal Swedish Academy of Engineering Sciences and the Swedish Tourist Board. Barbro Osher is the founder of the Swedish Women’s Educational Association (SWEA) chapter in San Francisco and was president of Positive Sweden/North America, an organization furthering the image of Sweden through educational activities in the United States. She serves on the boards of the University of California (Berkeley) Foundation, the American-Scandinavian Foundation, and the Nobel Museum in Stockholm. She has received numerous honors and awards and most recently was presented the honorary title of Professor by the Swedish Minister of Culture. In addition to the Osher Foundation, she is president of The Barbro Osher Pro Suecia Foundation.

Mary G. F. Bitterman, President

Prior to becoming President of the Osher Foundation, Bitterman served as President and CEO of The James Irvine Foundation and before that as President and CEO of KQED, a major American public broadcasting center. She has served as Director of the Hawaii Public Broadcasting Authority, the Voice of America, the Hawaii State Department of Commerce and Consumer Affairs, and the East-West Center’s Institute of Culture and Communication. Bitterman currently is a director of Bank of Hawaii, Bay Area Council Economic Institute, The Bernard Osher Foundation, Commonwealth Club of California, and the Hawaii Community Foundation, and she chairs the PBS Foundation Board. She also is an Advisory Council member of the Stanford Institute for Economic Policy Research, the Public Policy Institute of California, and Pacific Forum/CSIS. She is an Honorary Member of the National Presswomen’s Federation and a Fellow of the National Academy of Public Administration. Bitterman received her B.A. from Santa Clara University and her M.A. and Ph.D. from Bryn Mawr College.

“OLLI is a great opportunity to explore those interests you’ve secretly harbored in your earlier life that you didn’t have time to pursue. Now is the time and OLLI is the place.”

John Lungerhausen
**Giving Opportunities**

OLLI at DU continues to thrive through the generosity of The Bernard Osher Foundation, the University of Denver, and most importantly, our generous OLLI members who have made tax-deductible contributions to enrich and enhance our OLLI program.

Supported through the Advancement Office at DU, our OLLI annual appeal fundraising efforts revealed the continued financial commitment of members who were willing to invest in the program. Our members recognize they are helping to sustain our OLLI program for the future.

In addition to the annual appeal the University of Denver has created a planned giving program for our OLLI members offering options such as gifts of stock, bonds, mutual funds, life insurance, bequests and retirement plan asset gifts. Planned gifts are an excellent way for our supporters to make a meaningful contribution to OLLI and help sustain the program in the years ahead. For more information about these donor opportunities and how they might meet specific planning needs and objectives, contact the Office of University Advancement at DU at 303-871-7469.

**Our Financial Picture**

### OLLI TOTAL REVENUE FY 2018

- Registration Fees 85%
  - $701,363
- Osher Endowment 15%
  - $125,691

### OLLI TOTAL EXPENSES FY 2018

- Salaries 46%
  - $376,934
- Facilitator Support 14%
  - $114,889
- Operating Net 2%
  - $20,763
- Meetings 2%
  - $14,190
- Office Supplies 5%
  - $37,499
- Credit Card Fees 1%
  - $9,769
- Rent 24%
  - $201,054
- Postage & Printing 6%
  - $51,956

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I am happy that OLLI and I found one another.

Jim McKeown
Lots of new and exciting changes took place this year for OLLI at DU. One of the most significant was the launch of our online registration system which our members and staff embraced wholeheartedly. After years of processing paper registrations and checks, this new system has transformed and streamlined our program in a constructive way.

We opened two new OLLI sites – OLLI-on-Campus and OLLI East. OLLI-on-Campus is headed up by Joanne Ihrig, long-time OLLI West member. This program provides a unique offering in that University of Denver professors as well as other individuals representing significant aspects of the greater Denver community are the class instructors. From classes such as Mandarin Chinese for Beginners in the fall term to Exploring the Ice Age in Colorado in the spring term – OLLI members were exposed to a wide selection of topics.

OLLI East opened with a flourish in the spring term at a wonderful new site in Aurora. The open house was enjoyed by several hundred new and seasoned OLLI members. This site will help to alleviate over-crowding at OLLI Central plus open OLLI up to a whole new population in the east Metro area.

Our OLLI Central site experienced several important challenges this past year. Paul Simon (formerly Manager) moved to head up our new OLLI East site located in Aurora. Long time OLLI member, John Baumgartner replaced Paul as the new OLLI Central Operations Manager. After 19 years at Central Christian Church, OLLI Central fall and winter classes were moved and held at three different church facilities nearby. Spring term finally settled classes at two new locations, First Universalist Church and Park Hill Methodist Church. Even with all the significant changes, the OLLI Central membership remains our largest.

This year’s Worldview focus was on our neighboring country, Mexico. Classes facilitated by OLLI South member, Abe Grinberg, were held at all three sites in preparation for three unique trips. In March, OLLI
members enjoyed an archaeological trip to the Yucatan Peninsula visiting the ruins of Tulum, Chichen-Itza, Ek-Balam and Uxmal plus the colonial towns of Izamal and Valladoid. In late May, members embarked on an art and history trip to the Bajio region in central Mexico visiting Guadalajara, Guanajuato, Morelia and Tequila. During the summer the last trip will find OLLI members in Mexico City and surrounding areas enjoying the art of the muralist and Frida Kahlo.

OLLI West enjoyed many wonderful highlights this past year including celebrating their 10th anniversary with a fun Halloween costume party. Launched by OLLI West several years ago, Memoirs in the Mountains continued to inspire and support OLLI writers of varying experience and confidence levels. In a setting where words seem to pour freely from every pen, participants discover parts of themselves long abandoned but not quite forgotten. Long time OLLI West member and facilitator, Kirsten Morgan, generously donated funds for OLLI West to purchase two more Redcat Access Audio System. Stepping forward to help, Kirsten saw time and time again her fellow members struggling to enjoy their classes only because they couldn’t hear what was being shared. These systems have made all the difference to so many OLLI members.

Eight years ago beginning with 88 members the first term, OLLI South is now approaching the 500 member mark! This success is largely due to Jenny Fortenberry, OLLI South Manager, who retired from her position at the end of the school year. “Over the last eight years I have met so many wonderful people! It has been a very rewarding experience, and an unbelievable way to end an educator’s career.” New manager and OLLI South member, Connie Dawson, begins her role in September at OLLI South. The annual Trivia...
Night at OLLI South was another success beginning with Presidential question in the Hail to the Chief category. Other categories included Movie Lines, What’s in a Name, What on Earth, and Science. The Trivia winners received enthusiastic cheers from supporters and the losers got…. well, enthusiastic cheers from supporters.

Between the morning and afternoon sessions at OLLI South, members have another opportunity for learning as they continue their popular “Lunch and Learn” series. Members are invited to bring their lunch and listen to a speaker. Topics are varied and included Human Space Exploration Now and in the Decade to Come to Beyond the Climate Debate: Opportunities and Solutions.

Director Barbe Ratcliffe hosted the first annual OLLI at DU Wellness Symposium in November. The well-attended event featured four presentations from DU Knoebel Institute faculty and Kaiser Permanente doctors on different wellness topics: Physical, Emotional, Mindfulness, Nutritional, and Cognitive. The overall theme was “it is all interconnected” and “one size does not fit all.” The theme aim was to focus on how your physical being, emotional being, what you eat, and your social being all relate together to form your wellness ‘quotient’. And what works for one may not work as well for the next person; each person must figure out his or her own most effective activities. The best news that came from the event was that it is never too late to start when it comes to maintaining cognitive function. Starting early in life is best, but even starting in later years can still improve our lives. This first Wellness Symposium was a resounding success and an excellent start for what is to be an annual OLLI event.

Where else can you meet all the active, intelligent people in Denver? I think OLLI is a life saver for retired people - and it results in spin off groups of the friends made - in my case: a movie club, a creative writing group, and a chess club that meets all year round.

Bob Magnani
Our OLLI Program – Where “Curiosity Never Retires!”

While OLLI at DU is recognized for presenting a wide variety of academic and stimulating classes (475 this year), the social component of our OLLI program is every bit as significant as the learning element. There are many opportunities in the Denver metro area for older adults to partake in various age-appropriate activities but our OLLI at DU program allows members to not only experience demanding subjects but also to engage socially with their fellow students.

“Who says you can’t make new friends as an older adult?” Our members gather together before and after class, during coffee breaks, at events and even outside of OLLI. It is a joyous sound to hear so many active and engaged members talking at once during a coffee break. We are proud that our program has been the conduit for wonderful new friendships to develop among people who otherwise may have never even met.
We continue to be deeply grateful and amazed at the number of new and experienced volunteers who continually step up to facilitate our classes – without them, we would not have an OLLI program. And our appreciation also goes to our volunteer leadership as shown in our Advisory Councils and various committees including Curriculum, Social, Marketing, and others. Volunteers are at the very heart of OLLI at DU.

We have been so impressed by OLLI’s range of courses and the interesting people—both presenting and in the classes; it is superb venue for learning, fellowship, and discussion.

Don & Ellen Stanton
Our Management Team

Barbe Ratcliffe, Executive Director
Barbe brings more than 30 years of senior management experience in the relocation industry, where she worked with fortune 100 companies as they relocated their employees around the United States and world. Barbe entered the business world thru the finance door with her CPA and experience at Price, Waterhouse and Cooper serving her very well. She stayed in the business world because of the people and the uniqueness each individual brings. Barbe has her BS in Business Administration from Iowa State University and a CPA certification.

Barbe was an OLLI at DU member for five years before she accepted the position of Executive Director. During that time, she was a member of the OLLI 2020 team, a facilitator at OLLI South (primarily Mindfulness classes), a member of and later President of the OLLI South Advisory Board and finally the Curriculum Committee Chair person. Barbe’s belief in the value OLLI at DU brings to the many members it serves is evident in her commitment to the organization.

John Baumgartner, OLLI Central Manager
“I am proud to be a part of one of the top OLLI organizations in the country,” Baumgartner said. “I am looking forward to contributing to the fabulous legacy built by so many administrators and volunteers before me who established such a great place for adults to meet and learn.” Baumgartner has facilitated a handful of classes for OLLI Central, a background which has helped him transition into his new role. His final career move before “retiring” was acting Director of the Denver Division for a professional service placement company, a division of a publicly held international organization. He holds a BA from DePauw University and an MBA from the University of Michigan. With his CPA credentials he first was employed with Touche Ross (now Deloitte) He subsequently became Partner in Charge of the Denver Consulting Division of Touche Ross. Baumgartner later became senior Executive Vice President with a wholly owned subsidiary of a large NY Stock Exchange financial services company.

Jennifer Fortenberry, OLLI South Manager
Jenny Fortenberry has been involved in education for many years. She has a BS in Elementary Education and a MA in Counseling as well as Administration and Supervision. Getting involved in lifelong learning was a natural progression for her. It’s the best job ever for an educator; all of our students want to learn, all of our facilitators are volunteers, and I don’t have to deal with parents. It’s an educator’s dream job!

Joanne S. Ihrig, OLLI-on-Campus Manager
Joanne is a Denver native and University of Denver “Brat”….her father was an accounting professor at DU for 42 years. She received her BA and MA from DU in education and was a French and English teacher as well as an elementary educator.
in the Denver Public Schools and Cherry Creek Schools. She later received a Ph.D. from the University of Colorado and began a career as a school administrator. In this capacity she was Director of Elementary Education in Colorado Springs, and became a superintendent in Kremmling, Clear Creek, and Aspen Colorado. She also taught Educational Leadership at DU in the College of Education. In addition to her professional activities, she has also volunteered as an ESL teacher in Myanmar, Ecuador, and Cambodia, and serves on the board of Friendship Bridge which provides micro-credit loans to women in Guatemala.

**Debbie Loftin, Office Manager**

Debbie is a third-generation Denver native. She has been with OLLI since May of 2013 and is thrilled to be a part of this wonderful organization. Before joining OLLI Debbie worked for a bar exam preparation company for 15 years.

**Susan Schmetzer, OLLI West Manager**

Prior to coming to OLLI in January 2016, Susan had a rewarding 32-year career with the federal government. She worked the majority of those years for two agencies—the Department of Labor and the Department of Veterans Affairs. Highlights of her career with the VA included managing an organization of 800+ staff to support benefit programs for veterans and their dependents; and also having the opportunity to work collaboratively within the VA and with other organizations to implement new benefit programs and processes. Since retiring from the federal government, she has become involved in volunteer activities with the League of Women Voters.

**Paul Simon, OLLI Central Manager**

Paul’s more than 35 years experience in the news and online content industries in California, Nebraska and Colorado has included 11 years as an Associated Bureau Chief and four years as an editor at the Denver Post. His term as governor of the Colorado-Wyoming Optimist District ran Oct. 1, 2016-Sept. 30, 2017 and he served five years as volunteer chair of the Optimist Brain Bowl, coordinating hundreds of volunteers annually. He holds a MA in Mass Communication and a BS in Journalism.

**Darcey VanWagner, OLLI Central Operations Manager**

Darcey has 18 years experience in the financial industry. She has managed different operations and customer services departments. She has also been involved in public education and on the board of the local school. Darcy is glad to be part of OLLI and has enjoyed meeting a diverse group of people all eager to continue to learn and give their time.
OUR OLLI 2017-2018 ADVISORY COUNCIL & CURRICULUM COMMITTEE LEADERS

Our OLLI really is a community—a community of adults of diverse backgrounds... and life-experience and knowledge... who continue their quest for learning and growth and do so within a very congenial and respectful environment. It has greatly enriched my life.

Blu Wagner

Our deepest appreciation goes to this group of hard-working and dedicated volunteers. Throughout the year, they spend countless hours sharing their time and expertise to make our OLLI program an outstanding one. We salute them…

Bob Armstrong, OLLI/DU Budget & Financial Liaison

OLLI CENTRAL
Tom Bieging, Advisory Council President
Nancy Cain, Curriculum Committee Chair

OLLI EAST
Barbara Lilly, Advisory Council President
Ron Goodwin & Maria Valdes, Curriculum Committee Co-Chairs

OLLI SOUTH
Paul Mauro, Advisory Council President
Sally Walling, Curriculum Committee Chair

OLLI WEST
Malcolm Tarkanian, Advisory Council President
Tom Hughes & Gail Wilson, Curriculum Committee Co-Chairs
Our Community Partners

We collaborate with many local organizations to enhance our programming for our members. These organizations offer space, tours, lectures and classes and include:

- Active Minds
- Cherokee Ranch and Castle Foundation
- Colorado Shakespeare Festival
- Colorado Jazz Group
- Colorado Heritage Center
- Colorado Renewable Energy Society
- Denver Public Library
- Department of Interior Bureau of Reclamation
- Douglas County Land Conservancy
- Douglas County Library
- National League of American Pen Women
- Opera Colorado
- The Newman Center
- The Colorado Symphony
- The Denver Art Museum
- The Denver Center for the Performing Arts
- The Museum of Nature and Science