BOLLI Annual Report
Fiscal Years 2017 & 2018

FROM THE DIRECTOR...

WHAT MAKES US DIFFERENT?

WHO WE ARE

WHAT WE DO

MEET OUR MEMBERS

2017 FINANCIALS

INNOVATION

BOLLI MATTERS

2018 FINANCIALS

BOLLI
Brandeis
When I talk about BOLLI these days, my first words are often, “BOLLI is a small liberal arts college for older adults.” True, our watchwords have long proclaimed with admirable simplicity, “BOLLI: where learning and friendship thrive!” But at this moment in our history it’s time to supplement this aptly chosen phrase in order to capture more precisely what’s special about us today. BOLLI not only creates a community of learning and friendship, making us similar to many institutions of learning; BOLLI also thrives as a community where knowledge circulates, curiosity becomes inquiry, and readers rejoice in textual dispute. In these latter respects, we are distinguished among our peers: we are an academy teaching across ten disciplines, walking in step with Brandeis, an elite liberal arts college, and informed by the life experiences of older adults.

In these pages meet Beth, Howard, Fran, and Sue, each of whom has discovered a different path into BOLLI and, as a result into the adventure of higher ed. These members have created their own custom BOLLI. I would urge you to ponder their strategies for making BOLLI optimally meaningful within their own particular lifestyle. They feel they’ve achieved something precious at BOLLI, something that would be difficult to replicate anywhere else. You can too.

I believe that, in the coming half decade, BOLLI will only grow in its character as a small liberal arts college for older adults. As a community, we will continue to become more diverse and inclusive, a trend in much of American liberal education over the course of the past 50 years. Have an incisive thought to share or a question to add to the dialogue? In our very special and rapidly evolving academy, you have a place at the table.

-- Avi Bernstein
WHAT MAKES US DIFFERENT?

- WHAT WE TEACH
- HOW WE TEACH
- WHEN WE LEARN
- WHO LEADS

Think of us as a Small Liberal Arts College for Older Adults.
WHAT WE TEACH
A SMALL LIBERAL ARTS COLLEGE
FOR OLDER ADULTS

Literature, e.g. Reading Emily Dickinson’s Poetry, 1862-1864

History, e.g. Race Relations in America: The Role of the Supreme Court

Sociology, e.g. What’s the Right Thing to Do? What is Just?

Science, e.g. Exploring the Universe

Fine Arts, e.g. The Birth of Modernism in Bohemian Paris

...and more!
HOW WE TEACH

Our Educational Values

GUIDED INQUIRY

VALUING EVERY VOICE

CLOSE READING OF TEXTS

FACILITATED DEEP LISTENING

CULTURAL UNDERSTANDING AND CULTURAL CRITIQUE
WE LEARN YEAR-ROUND

Between July 1, 2016 and June 30, 2018, for example

- One hundred ninety four Study Groups
- Six Lecture Series
- One hundred sixty five hours of Faculty Seminars
- One hundred sessions discussing New Yorker short stories
- Forty-seven hours debating Current Events
STUDY GROUP LEADERS

Members apply to become BOLLI faculty. Applications are evaluated by a member-led committee. Mentoring and Coaching is ongoing.

Brandeis Graduate Students and Faculty apply for the BOLLI LECTURESHIP, a competitive prize awarded annually.

Occasionally Non-Members join the faculty. Applications are evaluated by a member-led committee and the Director.
FEATURED MEMBER
STUDY GROUP LEADER
SUE WURSTER

Courses Taught:
• American Dramas Featuring U.S. Presidents
• Doing Oral History, One Event at a Time
• Henry David Thoreau: Transcendentalist, Abolitionist, Anti-War Activist and "Gifted Weirdo"

63 Members taught between July 1, 2016 - June 30, 2018
FEATURED BOLLI LECTURER
GEORGIA LUIKENS
Since Fall 2013, BOLLI has been engaging Brandeis graduate students to run study groups and lecture series.

Courses Taught:
- Music Farewells: Elegy, Requiem and Remembrance
- America's First Maestro: Leonard Bernstein's Music and Role in New York's Cultural Life
- Various Lectures on Music Topics including Leonard Bernstein

Twelve BOLLI Lecturers served between July 1, 2016 and June 30, 2018.
BOLLI CORE ACTIVITIES

- **FALL TERM**
  - September - December
  - Study Groups 5 & 10 Weeks
  - Lunch Programs

- **WINTER TERM**
  - January - February
  - Lecture Series
  - Brandeis Faculty Seminars

- **SPRING TERM**
  - March - May
  - Study Groups 5 & 10 Weeks
  - Lunch Programs

- **SUMMER TERM**
  - June - August
  - Lecture Series
  - Brandeis Faculty Seminars

- **STUDY GROUPS**
- **LUNCH PROGRAMS**
- **LECTURE SERIES**
- **BRANDEIS FACULTY SEMINARS**
- **SPECIAL INTEREST GROUPS**
- **LEADERSHIP**

Special Interest Groups
Volunteer Leadership
During the Fall and Spring terms, BOLLI offers five and ten week study groups reflecting a commitment to a broad liberal arts curriculum. A catalog of study groups is published in January and June.
LUNCH PROGRAMS
40 each Spring and Fall

In the Fall and Spring quarters, BOLLI lunchtime programs include a distinguished speakers series featuring figures of high reputation in politics, journalism, the arts, and academe. These presentations take place from 1:00 to 2:00 at our 60 Turner Street location in Waltham and are open to all members.
LECTURE SERIES
Winter & Summer

Each series of four or five lectures typically features a question or theme from American history, musicology, or world literature. These series are presented by outstanding Brandeis graduate students or faculty members and are distinguished by their flexible format. Many members come for the entire course. Others appreciate the opportunity to pick and choose among sessions. These series are open to all members.
BRANDEIS FACULTY SEMINARS

Two each Winter and Summer

This unique format brings Brandeis Faculty to 60 Turner Street to teach for one discrete week—typically three hours per day for five days. Seminars are offered in January, February, June, July, and August and feature intensive instruction in music, film, literature, and religious studies. Seminars are open to both members and non-members.
SPECIAL INTEREST GROUPS (SIGs)
Year-round

BOLLI offers twelve SIGs, activities comparable to clubs in a college environment. In a SIG, members are encouraged to stretch their wings and indulge their interests--in writing, acting, photography, foreign language conversation, and more. These groups, active during all four quarters, are member-led initiatives open to all members.
Mr. Osher conceived of Osher Institutes as places where members would not only learn, but also build! More than ten percent of BOLLI members have answered the call to help.
WHO WE ARE

• We are a Year-Round Membership Organization
  • Typical Membership is Six or Twelve Months
  • Fall and Spring feature Study Groups, Winter and Summer feature Lecture Series
  • Members range 55 and Up

• New Members have Great "Trial" Options
  • A Five Week Trial: All Welcome!
  • Special Opportunity for Waltham Seniors via Waltham/BOLLI Engage
TYPICAL MEMBERSHIPS

- Fall/Winter 2016
- Spring/Summer 2017
- Fall/Winter 2017
- Spring/Summer 2018

- Annual Comprehensive
- Annual Lecture & Activities
- Seasonal Comprehensive
- Seasonal Lecture & Activities
- Trial
- Other (Waltham/BOLLI Engage, Snowbird)
- Total Members
DEMOGRAPHICS
July 1, 2016-June 30, 2018

35% Male
65% Female

Average Age:
74
Beginning with our core activities, anyone can create a custom BOLLI experience.

These four BOLLI members have crafted individual programs that reflect not only their interests but their scheduling needs as well.
Beth Davis

Beth is a longtime Annual Comprehensive Member.

**Joined:** 2005

**What Keeps Beth at BOLLI:** The interesting and thoughtful people with diverse experiences who make class discussions so stimulating and enlightening.

**Favorite class:** Cryptography, which I knew nothing about and was not my first choice of class. It turned out to be an all-time favorite.

**When Beth Recommends BOLLI, she says it’s...**

Stimulating, challenging, enlightening, friendly, inclusive.
Howard is part of BOLLI's “new wave” of under-65 members. He appreciates the opportunity to vary his affiliation season-by-season according to what his current schedule involves.

**Joined:** 2015

**What Keeps Howard at BOLLI:** The challenging, well-conceived courses. Participants are sharp, and the teaching is generally exceptional.

**Favorite Class:** “Historical Fiction: Traveling in Space and Time with Geraldine Brooks”

**When Howard recommends BOLLI, he says it's...**
Well-run, community-oriented, friendly, stimulating, and manageable even for members who desire a flexible schedule.
Fran Feldman

Fran maintains a Fall/Winter Comprehensive Membership and a "Snowbird" Membership in the Spring (2nd half of term)/Summer

Joined: 2010

What Keeps Fran at BOLLI: Learning with my peers as both a class participant and a Study Group Leader.

Favorite Class to Teach: The Reluctant Ally based on Lynne Olson's "Citizens of London"

When Fran recommends BOLLI, she says it's... Challenging, inspiring, enjoyable, and life-enhancing
Sue Adams

Sue joined as a Waltham BOLL! Engage Member and now maintains a Waltham Lecture and Activities Membership.

**Joined:** 2017

**What Attracted Sue to BOLL!** So many intellectually curious people in such a stimulating environment.

**Favorite Lunch Program:** "Reducing Recidivism through Smart Justice Initiatives" with speaker Peter Koutoujian, Sheriff of Middlesex County; "Losing John F. Kennedy: Leonard Bernstein's Musical Farewell."

**When Sue recommends BOLL! she says it's...**

*Stimulating, always interesting, welcoming.*
FY17 Financials

Income (Where the money comes from)

- $7,350 Brandeis Operations Fund
- $13,168 BOLLI Operating Fund
- $65,400 Endowment Fund
- $258,123 Membership Dues & Tuition

Expenses (Where the money goes)

- $61,229 Support Services Assessment
- $48,680 Operating Expenses
- $234,600 Personnel Expenses (Staff, Faculty, Student Wages, Fringe Benefits)
CURRENT FINANCIAL STRENGTHS

Operations Fund Balance: $41,029.29
Gifts to this Fund support ongoing operational expenses for BOLLI.

Endowment Fund Balance: $1,713,607.55
Gifts to this Fund support the administration of the BOLLI program at 60 Turner Street.
FY18 FINANCIALS

Income (Where the money comes from)

- $66,306.37 Endowment Fund
- $264,085.53 Membership Dues & Tuition
- $3,162.50 BOLLI Operating Fund
- $5,830.50 Rabb Adult Learning Fund

Expenses (Where the money goes)

- $61,670 Support Services Assessment
- $34,265.05 Operating Expenses
- $243,446.28 Personnel Expenses (Staff, Faculty, Student Wages, Fringe Benefits)
CURRENT FINANCIAL STRENGTHS

Operations Fund Balance: $42,781.79
Gifts to this Fund support ongoing operational expenses for BOLLI.

Endowment Fund Balance: $1,817,708.21
Gifts to this Fund support the administration of the BOLLI program at 60 Turner Street.
INNOVATION

• Community Structure & Governance, promoting collective planning and joint problem solving
• Creative Retirement programming, funded by a generous Bernard Osher Foundation Grant
• New Membership types, promoting accessibility and affordability
Adventures in Creative Retirement Conference
September 9, 2017
BOLLİ MATTERS

We embrace learning as a way of life -- it reaches into every aspect of our community. BOLLİ people move into this life -- life after full-time work -- with an attitude of purpose and a sense of joy. BOLLİ matters because of this.

Avi Bernstein
BOLLİ Director