For those who remember when UC Berkeley was practically free and rent near campus was affordable, it’s hard to fathom that a Cal education with living expenses will cost about $31,000 next fall. The economy and rising college fees are putting new stresses on students who are forced to cobble together grants, loans, scholarships, and part-time jobs to make ends meet.

More than 70 percent of our undergraduates receive some form of financial aid and halfway through this academic year, hundreds of additional students made urgent appeals for support. One third of our undergraduates come from families making less than $45,000 per year — a number that is up 11 percent this year as 900 additional families dropped into that low-income bracket.

It’s a challenging time to be a student — a time when money worries can get in the way of studies. It’s a time when scholarships are a salvation.

“Our goal is to raise enough private support to double the amount of scholarships we can offer to deserving students,” says Harry Le Grande, vice chancellor for student affairs. “Today, even with many generous donors, we have only enough scholarships to support about 2,600 of the 4,600 students who qualify based on academic merit and financial need.”

As you will read about in this issue of Cal Futures — which features two alumni donors who served their country in World War II — some of those who benefited from a low-cost education are now giving back. And their gifts are buoying individuals, families, and entire communities.●
A boy with terrible eyesight who wore glasses for as long as he could remember, John Austin ’52 says he knew every optometrist in Oakland and received a “volume discount.” Perhaps it’s not surprising then that when John returned to the Bay Area after spending years as a flight engineer in the belly of transport planes during World War II, he set his sights — quite literally — on the study of optometry at UC Berkeley.

“Anybody going to college went to Cal. It was easy to get to and cheap and that’s just where you went to school,” he says. “Thank God for the GI Bill.”

“That’s the only way he could do it,” adds Norma, his wife of more than 60 years. She says her husband paid just $35 a semester to attend Berkeley and received $75 a month on the GI Bill.

John met Norma, the love of his life, in an English class at Cal. He says it was the best class he ever took — mostly because of Norma but also because he enjoyed learning fundamentals such as making subjects and verbs agree.

During their courtship, John and Norma ate lunch on faculty glade and went to Cal football games. After marrying in 1949, they moved to Oakland’s Grand Lake district and walked to concerts at Lake Merritt on Sundays. When John graduated, they hung an optometry shingle in Fremont — John seeing patients and Norma handling the business side.

In those early days, an optometry practice didn’t rely on advertising, but rather on word-of-mouth recommendations and the quality of patient care, which the Austins took very seriously. The couple participated in the city’s civic and business organizations and built a thriving practice. They also invested heavily in stocks that did well, even after John retired in 1998.

“We got to feeling that we had more money than we needed,” says John, who still lives with Norma in the impeccable and modest Fremont home they bought more than five decades ago. “I thought I’d rather give the money to the school for scholarships than to the government.”

And so they have, with generous scholarships that make Berkeley affordable for several students each year.

From one optometrist to another

One of the students who benefits from the scholarships established by John and Norma Austin is fourth-year optometry student Patty Oh.

Oh, who turned 40 this year, was midway through a Ph.D. at Stanford in biology, when she realized that she didn’t want to be staring at test tubes all day.

“I really wanted more human interaction,” she says. “I enjoyed the thought process, but when it came to the day-to-day work, it wasn’t as interesting.” She dabbled in high-tech and even went to Brazil to teach English.

“I wanted to start my day and end my day with the satisfaction of knowing that I had helped someone or achieved something for that day,” she says. Optometry beckoned because it promised to combine her people skills and aptitude in science.

Oh had saved money for tuition, but like many students had not accounted for the downturn in the economy or the significant hike in student fees this year. She says the scholarship from the Austins has helped to cushion the financial blow.

She is grateful for the support. “It’s really amazing to me that the Austins fund not just one scholarship, but several. It’s an enormously generous action of theirs to support so many students,” she says.

Because the Bay Area is saturated with optometrists, Oh is planning to head to Seattle for a residency after she finishes at Cal in May. Although she’s a bit concerned about handling the rain after 17 years of Bay Area sunshine, she says she’ll be going home to nieces and nephews, and lots of friends.

Answer to “Famous Alum”

Leroy Chiao ’83 has logged nearly 230 days in space — including more than 36 hours on space walks — on four separate flights. Chiao, who studied chemical engineering at Berkeley before earning his Ph.D. at UC Santa Barbara, flew on space shuttles Columbia, Endeavor, and Discovery, and commanded Expedition-10, a mission aboard the International Space Station in 2004. “Forty years ago, I watched with the rest of the world as Eagle touched down on the surface of the moon,” wrote Chiao in the Guardian UK describing the Apollo 11 mission on television. “Even as an eight-year-old boy, I knew that the world had just changed. I knew that I wanted to be an astronaut. I wanted to do that.” On November 2, 2004, he became the first American to vote in a presidential election from space. Chiao left the space agency after 15 years and four NASA Flight Medals. He is now an entrepreneur, motivational speaker, and consultant.
At UC Berkeley’s Faculty Club, Peter Avenali ’39 and his wife, Joan, are having lunch with the students who benefited from their scholarships this year.

Seated at Peter’s right is Berkeley senior Marvin H. Nettles Jr., the first in his Oakland family to go to college, who will attend law school in the fall and envisions running for mayor of Oakland one day. To his left is Katherine Trujillo, the first in her family to go to college, a student leader who looks toward law school and a bid for the presidency in 2044. Across the table is Alana Cararra, on her way to medical school so that she can become a doctor who creates health clinics in Central America and Africa. And next to Joan sits Mateo Fabersunne, from the tiny town of Dixon, who is just trying to make his family proud.

These are just four of the 10 “Avenali Scholars” this year. “I am only here because of the philanthropy of people like you,” says Mateo, speaking for all of the students, as everyone raises a glass to the Avenalis.

Growing up in East Oakland, Avenali Scholar Marvin H. Nettles Jr. didn’t have any models for going to college, let alone flourishing in college. His only connection to UC Berkeley as a young man was as a skateboarder riding the ledges of Wurster Hall and Sproul Plaza. “There were no examples,” he says, “nobody to take a lead from or to give that guidance.”

After high school, Nettles pursued a music career, produced an album, and even taught music production to other young people. But he wasn’t satisfied. At age 31, he enrolled in Oakland’s Laney Community College and while studying W.E.B. DuBois during a first-semester African American history class, he had an epiphany: He could do more to help disadvantaged communities. He plunged into political science at Laney with a vision of a law degree emphasizing civil rights law or human rights law. After two years, he applied to Berkeley. “When I got the acceptance letter, I just cried,” he says. “It was such a long road to get here — and a lot of work. It was a sign that I was on the right path.”

Now a graduating senior, Nettles has applied to law schools ranging from Berkeley to Harvard as well as master’s programs in city and regional planning. He plans to pursue both degrees at once.

Nettles can hardly contain his appreciation for the Avenalis, his scholarship donors, who spared him at least $25,000 in debt upon graduation. He says the donors gave him an incredible opportunity and a gift to be a scholar who didn’t have to juggle jobs and studies. The support enabled him to wholeheartedly benefit from a Cal education.

“I am only here because of the philanthropy of people like you,” says Peter, who is visibly moved by these articulate, determined students. “We’re lucky to be able to do it. In a sense, it’s selfish.”

Joan agrees with the sentiment. “It goes against the grain to give money to something when you don’t see the results,” she says. “Here, you see the results.”

Peter was a young man during the Great Depression and says his Berkeley education cost about $25 a semester — a price that included tickets to Cal football games. The son of an Italian immigrant who was among the first employees of the Bank of Italy, now the Bank of America, Peter graduated from Berkeley with a degree in English literature, went to Harvard Business School, and then to war. He spent four and a half years in the Army, serving time on the frontlines, including at the bloody Battle of the Bulge in which some 19,000 Americans died.

Joan, a graduate of Sarah Lawrence College, was in the Navy working as a radio operator in Madison, Wisconsin, when she met Peter. They married after four dates in 1945 during Peter’s 30-day leave from the Army and honeymooned in Lake Tahoe.

The Avenalis settled down in San Francisco and raised three children. Peter was among the first employees of Dodge and Cox, Inc., an investment counsel firm, and he later became the firm’s CEO. Although he retired 20 years ago, he goes to the downtown San Francisco office nearly every day.

Peter and Joan say they are always inspired after meeting their scholarship recipients.

“You can see how badly scholarships are needed,” says Peter. “And you can see how well they work.”

“Taking pleasure in giving”

Becoming an example

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Nettles says his success at Berkeley is having a concrete effect on his family and community. For example, he is guiding friends and relatives through the ins and outs of transferring to a four-year college and is helping his younger brother prepare to apply to graduate school. “I am kind of a pioneer in my family,” says Nettles. “Now I am able to turn around and hold their hands in the process. There will be a new element in our family that wasn’t there before — the experience of going to college.”
The impossible becomes possible

The Avenali Scholarship also supports Katherine Trujillo, a first-generation college student from South Central Los Angeles. Trujillo says “the impossible happened” when she was accepted to Cal.

Even through her enthusiasm she feared that family finances would prevent her from attending “I was very excited about becoming a college student, but soon came to realize that my family and I would not be able to fund my education,” says Trujillo, whose older brother was accepted to the University of Southern California but couldn’t afford to go.

When the financial aid award letter came, Trujillo says it seemed her dreams were falling into place. When she arrived on campus and fellow students encouraged her to speak in her native language, Spanish, she felt that she had found a community and a home.

During her first three years at Cal, Trujillo has become active in many student organizations, especially ones that help encourage and support Latino students. She is currently president of the Hispanic Scholarship Fund at Berkeley.

The Cal junior is pursuing a degree in interdisciplinary studies with her eye on a law degree, the Los Angeles mayor’s office, and even a bid for the presidency in about three decades.

She is encouraging her older brother, now 31, to apply to college again — perhaps even to Berkeley — and recently wrote him a small check so that he could take some preliminary exams.

Says Trujillo: “This scholarship has allowed me to grow to my fullest potential, to find my true passions, to excel in whatever field I please, and to give back to the community that helped me get to where I am today.”

A Wheeler Tea Save the Date

The 23rd annual Benjamin Ide Wheeler Society Tea hosted by Chancellor and Mrs. Birgeneau will be held on July 20, 2010.

Thanks to Berkeley…
It has provided a wonderful education to me, my children and grandchildren.

Morrison Chan '43

Notes from the Director
The Estate Tax Went Away…or Did It?

The student stories you have just read are a small sampling of how your gift can impact a life, a dream, and a community.

With inevitable strains on the state budget for the foreseeable future, your gifts are more important than ever. And with major changes to tax law on the horizon, the time is ideal to talk to Cal’s Gift Planning Department.

A new law was passed in 2001 that gradually decreased both the number of people subject to the federal estate tax and the rate of the estate tax rate through 2009. That law stipulated that if no future laws were passed, the estate tax would go away in 2010 — only to return with a vengeance in 2011 to subject all estates in excess of $1 million to a much higher tax rate of 55 percent.

While many assume that a legislative solution will emerge, nothing is pending, and estate planning has become ever more complicated.

If you have an estate plan that was written before 2009, it’s wise to ensure that your plan is up-to-date based on current law — and not just for estate tax reasons. This year may be a “watershed year” that calls for a careful review of your plan.

For example, a will provision which leaves “the amount exempt from federal estate tax” to children could result in leaving less to your spouse or more to children than you intended.

If you are reviewing your estate plan and want to learn more about the changes to the estate tax or include a gift to Cal in your will or living trust, we would be happy to answer any questions and/or provide you with the appropriate language.

By leaving a gift to Cal, you are playing a vital role in fulfilling Berkeley’s promise of sustaining academic excellence, educating eager minds, and contributing to the betterment of society. To learn more, just give us a call at 510.642.6300, 800.200.0575, or send an email to ogp@berkeley.edu.

Fiat Lux!

Kevin T. Crilly
Director, Office of Gift Planning

This newsletter offers only general gift planning information. We urge you to seek the advice of an attorney in developing your personal estate plan, as the Office of Gift Planning may not render tax or legal advice to friends and alumni of the University. If you would like more information concerning charitable giving as a component of estate planning, we would be happy to provide you with more specific ideas.

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How to contact the
Office of Gift Planning

call 510.642.6300 or 800.200.0575 (toll free)
e-mail ogp@berkeley.edu
web berkeley.planyourlegacy.org

Please ☐ call me/us ☐ send information about:

Gifts that pay you income
☐ Cash/Securities ($10,000 minimum)
☐ Real Estate ($150,000 minimum)

Gifts the University can use today
☐ Real Estate
☐ Cash/Stocks/Mutual Funds

Gifts that take effect at your passing
☐ Bequest
☐ Brokerage Accounts
☐ Retirement Plan — IRA/401(k)/403(b)/other
☐ Life Insurance
☐ Personal Residence

☐ I/We have already included Cal in my/our estate plan.

☐ I am/We are not sure which gift plan would work best. Please contact me/us.

Name(s)

Best time of day to contact me/us: ____________________________ a.m./p.m.
(______) (______)  Home Phone  Business Phone

E-mail