

AMHERST COLLEGE - HAMPSHIRE COLLEGE - MOUNT HOLYOKE COLLEGE - SMITH COLLEGE - UMASS AMHERST

FIVE COLLEGE LEARNING IN RETIREMENT

Peer-Led Lifelong Learning

ANNUAL REPORT

2012-2013



Moderator's Meeting Photo by Katy van Geel

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PRESIDENT'S SUMMARY REPORT

This has been a good year for Five College Learning in Retirement. Our nearly 300 members have participated in a wide variety of educational and social activities, including seminars, interest groups, workshops, trips and public lectures. The following will touch on some of the highlights:

Seminars:

In the fall and spring semesters we had our usual offering of about 25 peer-led seminars, covering a diverse range of subjects including those related to history, philosophy, science, economics, fine arts and literature, among others. The Curriculum Committee has done an excellent job of recruiting moderators and fresh new topics, and our seminars continue to be the backbone of our organization.

Special Programs:

Our special programs offer important educational opportunity for an increasing number of our members through participation in ongoing interest groups. We have discovered that a significant number of our members join 5CLIR primarily for the opportunity to participate in a variety of interest groups focusing on topic such as the arts, books, travel, ethnic food, French and Italian conversation, genealogy, current affairs discussion and opera.

Winter Summer Programs:

We offer a number of activities during the winter and summer breaks. These include trips to art museums, Tanglewood, and theaters, as well as local attractions such as Arcadia, a Connecticut River cruise and Amherst College's lovely Japanese garden. This year we offered trips to Gettysburg battlefields and to Southeastern Pennsylvania to visit its lovely gardens and outstanding museums.

Great Decisions:

For a number of years we have been organizing a lecture series on world affairs based on materials provided by the Foreign Policy Association. We take advantage of the Five College's splendid faculty who conduct the lectures. This year's topics included "Egypt", "China in Africa", "Diplomatic Intervention", "Iran" and "Future of the Euro". The lectures were followed by lively questions and answers. For the five lectures we averaged 85 in attendance. Their feedback was very positive.

Technology

The proliferation of new devices offer a particular challenge to those of us who remember lives without television, so say nothing of cell phones and iPads. Our Technology Committee has worked valiantly to close the gap between us and our grandchildren. This year a very successful “technology fair” focused on getting acquainted with smartphones and tablets. Devices were demonstrated and questions were answered.

Finance:

This year our income totaled approximately \$58,000 which was sufficient to cover nearly all our costs. In November, our reserves were greatly enhanced by a handsome gift of \$10,000 in memory of Carl and Dorothy Swanson from their family. Carl and Dorothy were among the founders of Five College Learning in Retirement. We are deeply grateful for their efforts and their family’s generosity.

Operations:

Two important operational events occurred this year. First, in conjunction with Five Colleges Inc., we set up a “Fund for the Future”, seeking to build a reserve, the earnings of which, could eventually be used for special projects, scholarships etc. Five College Inc. has kindly allowed us to put those monies into their investment fund. It is anticipated that earnings will be reinvested, along with any yearly surplus in order to grow our Fund to a size large enough to generate meaningful income. Our target is an amount equal to one year’s budget.

A second event was the retirement of our office manager, Callie Orszak and the hiring of her replacement Liz Tiley. Callie has been a cheerful, friendly face of our organization and effective office manager who has been the hub of many of our programs. We will miss her, but look forward to working with Liz.

I have had the pleasure of working with the other members of our executive committee – Joan Wofford (past president), Carol Jolly (vice president), Ellen Peck (secretary), Sandy Muspratt (treasurer) and Betsy Loughran (assistant treasurer)- and the Council, as we complete a very successful year

Jim Harvey, President

VICE-PRESIDENT'S REPORT

Following the practice instituted several years ago, I convened a meeting in September with all the LIR Committee Chairs to discuss expectations for the coming year and the important role of committees. We talked about the value of reviewing the Operations Manual which describes each group's responsibilities and about the value of having each committee represented at each Council meeting. Special emphasis was placed on the need to track each committee's budget and to consult the Treasurer before committing any funds above \$100,

In addition to attending each month's Council meeting, I also attended several committee meetings, notably that of the Finance Committee. Prior to the April Preview, I condensed the Operations Manual descriptions of the committees into a newsletter article that would help members select a committee on which they wish to serve in the coming year. These abbreviated descriptions were also included in new member packets to help encourage their joining a committee.

With more attention being focused on Credit Unions in the past few years, I wanted to explore the UMASS Five College Federal Credit Union, which I thought might be a natural link to 5CLIR. I discovered that although the Credit Union is open to employees of the 5 Colleges and to members of a wide variety of area organizations (e.g., River Valley Market, Dakin Humane Society, the Amherst Golf Club), it was not automatically open to members of our organization. Having consulted with Council about the desirability of our being a qualifying organization – a suggestion that was unanimously endorsed -- I have been working with the Credit Union's Member Outreach Director on the process for us to gain that status. I am hopeful that before the end of the fiscal year, 5CLIR members will qualify for Credit Union membership. Membership will not only enable households to maintain savings and checking accounts and potentially to take out loans, but also opens the possibility of their staff providing various finance-related workshops.

As President-Elect, I was heavily involved in the recruitment and selection of the new Office Manager to replace Callie after her retirement. We have selected Liz Tiley for this position and I am confident she will be a great asset to 5CLIR.

SECRETARY'S REPORT

As continuing secretary, I took minutes for all executive committee meetings, Council meetings, and the annual meeting in May. Included with the minutes were all written reports from the various committees. I sent copies of these minutes to all Council members and committee chairs as well as the Office manager. I kept a notebook of all minutes which was available at all meetings. Minutes were also archived in the Office where they were available to any member who inquired.

Secretary—Ellen Peck

TREASURER'S REPORT, FYE JUNE 30, 2013

This year saw satisfactory stability in the finances of Learning in Retirement. With the current fee structure and an enrollment just under 300, the costs of running the organization, other than personnel costs, approximate \$10,000. Typically, income also includes small surpluses generated by Summer/Winter programs and Great Decisions. Such is expected to be the case this year –final figures are not yet available.

Two major changes mark this financial year.

- Full operation of the new accounting software at Five Colleges Incorporated. Heretofore, treasurers have maintained a book of accounts parallel to the legal book of accounts kept by Five Colleges Incorporated. This has led to uncertainties in reconciliation between the two sets, inappropriate rigid categorization of transactions, difficulty searching the accounts when a transaction subsequently comes under question, and mystification as each treasurer reviews the idiosyncratic books of his predecessor. Now in a single of set accounts at Five Colleges Incorporated transactions (especially receipts from members) are entered in sufficient detail to facilitate searching; categorization of transactions is according to requirements of Learning in Retirement, is distinct from that utilized by Five College Incorporated and is under full control of the treasurer. Passage from one treasurer to the next is much eased. The drawback of the new regime is short delay (as noted above) in availability of reports
- The long considered Future Fund has been established. This is the participation of Learning in Retirement in the endowment fund of Five Colleges Incorporated. Over the years our organization has accumulated a healthy surplus above the needs of a prudent annual operating reserve; this is now allocated to an investment account earning dividend (and at risk of capital loss). The opening of the account evoked a most generous gift from the Swanson Foundation and further contributions have been received –an example that the treasurer heartily commends to the membership.

Sandy Muspratt, Treasurer

REVENUE & EXPENSE
JULY 1, 2012 - JUNE 30, 2013

Revenue

Dues - full year	(41,250.00)	
Dues - spring	(4,020.00)	
Dues - trial	(720.00)	
Dues - associate	(720.00)	
Dues - discounted	(1512.50)	48,222.50
Gifts - membership assistance	645.00	
Gifts - other	10,020.00	

Expense

Committees	curriculum	882.33	
	members	(1259.59)	
	preview	4704.54	
	public relations	0.00	
	special programs	166.69	
	technology	341.42	
Office	copying	400.27	
	memorial event	55.80	
	newsletter & website	503.94	
	postage & phone	1548.23	
	president's discretionary	856.85	
	other	1,100.34	
Personnel	salary	42,705.28	
	fringe	10,702.92	53,408.20
Programs & events	Great Decisions	(1,355.71)	
	summer/winter	(160.97)	

NET WORTH
JUNE 30, 2013

Assets

Banked at FCI	88,536.87
Petty Cash	200.00
Future Fund at FCI	38,696.00

Total assets	-----,---	127,432.87
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Liabilities

Dues & fees prepaid	48,982.58
Donor restricted: membership	302.50
Strategic reserve	30,000.00

Total liabilities	-----,---	79,285.08
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Net Worth		48,147.79
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Net worth June 30, 2012		36,100.63
Revenue–expense 2012-13		2,027.16
endowment contributions		10,020.00
Net worth June 30, 2013		48,147.79

OFFICE MANAGER'S REPORT

Much of this year was spent on updating and improving the Access database. As the president of 5CLIR is the "database consultant," the weekly president-office manager meeting was often an opportunity to discuss refinements to queries and solve various problems encountered during the previous week. The weekly meetings were particularly useful in this regard!

I worked with the Curriculum committee co-Chairs to further improve our system for turning raw seminar proposals straight off the website into finished catalog-ready copy. As soon as a proposal came into my Inbox, I formatted it, using the catalog template, and fixed any glaring errors of punctuation before sending it, unedited, to the Curriculum committee co-Chairs. Once the proposal had been edited (if necessary) and approved, I was emailed the catalog-ready copy for insertion into the seminar catalog in progress. This system proved to be the most time-efficient and most error-free to date.

I worked hard on producing paperwork for the lottery that was easy to use, cut down on errors (like booking an LIR member into two seminars that meet at the same time on the same day), and would make the whole process clearer and take much less time to complete...and would greatly cut down the time required to check results when the lottery was completed. The result was a lottery done in record time with very few errors.

Callie Orszak

CURRICULUM COMMITTEE

Carol Jolly and Marybeth Bridegam, Co-Chairs

The Curriculum Committee creates and maintains the 5CLIR seminar program; it meets 9 times each year. Each semester the committee solicits proposals from members and then works with prospective moderators to clarify their proposals for the catalog. The committee helps organize the fall and spring Previews at which members interact with moderators to learn about upcoming seminars and make decisions about registration. In addition, the committee holds two Moderators Meetings each year – one in the fall focusing on improving seminars and one in the spring designed to encourage prospective moderators to submit proposals. The Curriculum Committee is also responsible for developing the Annual Calendar for submittal to Council.

All this activity would not be possible without the active participation of the committee’s members. Members deliberate on possible policy or procedural changes to the operations of the committee or of seminars, help organize the Moderators Meetings, and serve as liaisons to moderators in strengthening proposal content. This year, for example, the committee adopted several documents on improving audibility in seminars, which were then incorporated into the Moderators Manual.

We were able to offer 25 seminars and workshops in both the spring and fall semesters this year. As usual, the range of topics was huge, ranging from Western Philosophy to Harold Pinter, from Exploring the Amazon to the Ancient Celts, from the History of Agriculture to the Novels of Orhan Pamuk. Some attracted more participants than could be accommodated and necessitated lotteries and waiting lists. Thanks to the willingness of several moderators to defer, 5 seminars that had been proposed for the fall of 2013 will be held over till the spring of 2014.

Beginning next year, the committee’s membership will stand at 12 plus the co-chairs. Each ‘class’ is chosen from a list of 5CLIR members who indicate an interest in serving. Candidates must have been a member for at least one year, have taken at least two seminars, and preferably either moderated a seminar or served on another committee.

Membership of the Curriculum Committee, 2012 – 2013: Co-Chairs – Carol Jolly and Marybeth Bridegam

Term Expires 6-30-13

Dorothy Gorra
Ruth Hooke
Ruth Kosiorek
Ellen Peck
Pete Reitt

Term Expires 6-30-14

Anne Lombard
Don Maiocco
Ray Moore
Betsy Siersma

Term Expires 6-30-15

June Guild
Larry Gutlerner
Sheila Klem
Richard Szlosek

SPECIAL PROGRAMS

Special Programs had a successful year with ten on-going interest groups including two language conversation groups, French and Italian, the Travel Interest Group, Book Interest Group, Viewpoints, Encore and Friday Lectures, Opera Preparation, and Live Performances. Ethnic Eating changed its name to Dine Around and remains a very popular monthly event. The two programs launched last year, the Science Roundtable and Finding Family are flourishing. An Arts and Humanities Roundtable is still in the planning stage and looking for a facilitator.

Generous hosts for our programs are Applewood and Northampton Lathrop retirement communities, Highland Valley Elder Services, Smith College, and the Newman Center at the University; we especially appreciated the use of facilities at Florence Savings Bank for our meetings.

Special Programs committee members are also liaisons to the individual programs. The time and talent contributed by the members and facilitators who manage and present these programs are particularly appreciated by the attendees.

Submitted by Sara Wright and Diane Liebert, co-chairs

SUMMER/WINTER COMMITTEE

Summer 2012 had eight programs, all of which ran, including the 5CLIR picnic and a popular overnight trip to Seaside Maine and New Hampshire, which prompted travelers to ask for a two night adventure for the summer of 2013.

Winter 2013 offered eight different programs, all of which were well-attended. One program, "Let's Play," was cancelled due to the illness of the moderator, but will be offered again this summer.

The committee reviewed the problem of folks signing up for programs and then not attending nor alerting the moderator, which in some cases was embarrassing (for example, when one or more docents were booked at an institution to guide people). The decision was made by council to allow a small administrative fee for such programs to see whether paying for the event would encourage better attendance. It seemed to help with winter registrations and attendance and gives a small boost to our budget.

Discussion of overnight bus trips needs clarification and the committee is seeking an equitable way to prevent misunderstandings and best benefit the organization.

Respectfully submitted,

Ruth Kosiorek and Honore David, Co-chairs

GREAT DECISIONS COMMITTEE

Using materials from the Foreign Policy Association, the committee sponsored five morning-long sessions during the spring. The topics and speakers for this year were (1) Egypt: Power to the People, with Sohail Hashmi, (2) Feeding the Dragon: China in Africa, with Mwangi we Githinji, (3) The Intervention Calculation, with Jon Western, (4) Line in the Sand: Iran, Israel, and the Bomb, with Omar Dahi, and (5) Imperfect Union: the Eurozone in Crisis, with Mahnaz Mahdavi. Members of the committee met monthly throughout the year to secure the speakers, organize the sessions, publicize the program, and manage its financial and logistical aspects.

2013 was by all accounts a highly successful year. Feedback forms collected at the end of each session showed that every speaker was judged to be clear and informative, stimulating spirited question and answer discussions. On a scale of one to five, every speaker scored above four.

Attendance at the sessions averaged 85, up from 75 last year. We attribute the increase to a wide-ranging publicity campaign that included a brochure, information placed in LIR materials, and the decision to pay WFCR to announce the program on air.

This year's program was also successful financially. Total cost was \$3113, which included purchasing materials from the Foreign Policy Association, rental of the Northampton Senior Center for the sessions, honoraria for the speakers, publicity, and postage. Total receipts were \$4219, which included books and tickets sold. Thus, the program earned \$1106 to support the LIR budget.

On a less positive note, the sessions have continued to suffer from problems with the audio-visual system. It is clear that the speakers need a wireless lapel microphone that allows them to move about freely, and the audience needs handheld microphones that work effectively. Attendees at the sessions were vocal in their criticisms of this aspect of the program. As well, the Senior Center decided this year to no longer provide coffee, which detracted from the conviviality of the morning. The committee will tackle these issues for the coming year.

Members of the committee:

Bert Bandman
Sandy Cortez-Greig
Larry Gutlerner
Jim Perot

Joan Cenedella
Jake Greenburg
Chris Hurn
Claire Sherr

Co-Chairs: Peter Ferber, Fran Volkmann

TECHNOLOGY COMMITTEE

Sherri Meade has joined the Technology Committee and Judy Moran has agreed to be Co-Chair.

We held two Tech Fairs, one in December and another in June. We have tried to cover more recent technology such as cell phones, tablets, Ereaders, how to get Ebooks from the library, skype. The technology fair format was very successful according to the evaluations of those who attended.

We have been asked to get a wireless portable microphone for both some of the classes and The Great Decisions program.

James Perot & Janet Price

Co-Chairs of the Tech Committee, 2012 - 2013

FIVE COLLEGE LEARNING IN RETIREMENT
ANNUAL MEETING

April 25, 2013

Smith College Campus Center

Call to Order: The meeting was called to order by President Jim Harvey.

Minutes: The minutes from 2012 were approved as presented.

Treasurer: Sandy Muspratt reported that with 296 members we are healthy enough financially but remain close to the break-even point with our budget of approximately \$60,000. On screen he showed us the small amounts given to various committees, although they tend to cover most of their expenses. The total expenses for 2012 were \$58,844. Next year they are projected for somewhat less since taking on a new office manager will be somewhat less costly, at least at first. Since 5 College Inc. gives us free office space and much free classroom space, our expenses remain relatively low. We repay 5CI by being part of their publicity campaigns. Although we have not been actively recruiting this year, we do need to replenish our ranks; word of mouth is usually the best recruitment tool.

Great Decisions usually pays for itself and has a small surplus. Summer/Winter committee also sometimes has a surplus which we use to finance the all-member picnic in September. Sometimes we have gifts from members. This year we had a \$10,000 gift from the family of a former member. This will become part of the new Fund For the Future which is being created this month.

Dues for next year will remain the same, but there may be a need for an increase by the end of next year.

Council Elections: The slate of nominees for Council was presented. Ballots with bios will be mailed out after the annual meeting:

Paul Berman, Jean Boutin, Judith Camyre, Kate Collins, Joan Davis, Rafe DeLima, Eli Kwartler, Ina Luadke, Phyllis Muldoon, Dean Poli, Zina Tillona, and Fran Volkmann.

Officers: The slate of officers for next year was presented. There were no further nominations from the floor.

President—Carol Jolly
Secretary—Ellen Peck

Vice President—Michael Greenebaum
Treasurer—Betsy Loughran
Assist. Treasurer—Susan Beer

Committee Chairs: Jim asked the current committee chairs to stand and be recognized for all their hard work. Chairs for next year will be:

Curriculum: Marybeth Bridegam and Betsy Siersma

Finance: Betsy Loughran

Great Decisions: Peter Ferber and Fran Volkmann

Membership Services: Henny Lewin and Joan McKelvey

Public Relations/Publicity: Joan Wofford

Special Programs: Diane Liebert and Sara Wright

Summer/Winter: Honore David and Ruth Kosiorek

Technology: Jim Perot and Judith Moran

In addition we have:

Historian: Sara Wright

Ombudsman: Ann Lombard

Web Master: Janet Price

New President: Carol Jolly thanked Jim Harvey for his service during the past year and expressed a hope that we can explore new areas during the coming year.

One question that came from the Curriculum Committee was the date **for next fall's Preview**. Traditionally we have had the Preview on the Sunday afternoon before Thanksgiving. This often conflicts with the fall concert of the Hampshire Choral Society which includes a number of members and fans. It has been suggested that we try having the Preview on the Saturday before Thanksgiving. Next year would be an experiment to see if it affected attendance. The membership was asked to vote on:

1. Keeping it on Sunday
2. Alternating as an experiment next year. (There is no opera on that date.)

The majority of members present voted to try the alternative (#2).

Callie's Farewell Party: Jim announced that since Callie will be retiring in June, we will have a celebration on **Friday, June 14 from 4 to 6pm at the Amherst Alumni House**.

The members gave Callie a standing ovation for her eight years of service to LIR. She thanked us and said she will enjoy a retirement of travel, gardening, reading, and card-making.

Adjournment: The meeting was adjourned at 2:30. The Preview commenced with mentors' tables and food.

Respectfully submitted: Ellen Peck, Secretary

OFFICERS, COUNCIL MEMBERS & COMMITTEE CHAIRS

OFFICERS

President: Jim Harvey

Vice President/ President Elect: Carol Jolly

Secretary: Ellen Peck

Treasurer: Sandy Muspratt

Assistant Treasurer: Betsy Loughran

Past President: Joan Wofford

COUNCIL MEMBERS TERM EXPIRES

Marybeth Bridegam	2013
Laura Cranshaw	2013
Joan Laird	2013
Dorothy Gilbert	2014
Chris Hurn	2014
Gordon Wyse	2014
Peter Ferber	2015
Eva Sartori	2015
Jim Scott	2015

COMMITTEE CHAIRS

Curriculum Committee: Carol Jolly & Marybeth Bridegam

Finance Committee: Sandy Muspratt

Winter/Summer Programs: Honoré David & Ruth Kosiorek

Member Services: Frieda Howards & Eva Sartori

Special Programs: Sara Wright & Diane Liebert

Technology: Janet Price & Jim Perot

Public Relations: Joan Wofford

Great Decisions: Peter Ferber & Fran Volkmann

Development: Jim Harvey

Historian: Sara Wright

Ombudsman: Anne Lombard

Webmaster: Janet Price