

FIVE COLLEGE LEARNING IN RETIREMENT

Peer-Led Lifelong Learning

ANNUAL REPORT 2013-2014



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PRESIDENT'S REPORT

LIR's 25th Year Marked by Change and Celebration

Having held its first seminars in the spring of 1989, 5 College Learning in Retirement celebrated its 25th anniversary in April, 2014. The observance came in the midst of a year of changes and enhancements to our ongoing activities. But the year also was marked by our members' sustained participation in LIR's traditional programs.

Late in June 2013, Liz Tiley assumed the position of Office Manager, succeeding long-time manager Callie Orszak. With a wealth of computer and graphics skills, Liz jumped in enthusiastically to modernize and augment our on-line presence: developing an attractive and comprehensive web site, expanding our monthly newsletters, and creating opportunities for individuals to register for seminars and programs and even join or donate to the organization electronically.

During the fall of 2013, the UMass Five College Federal Credit Union determined that 5CLIR was a qualifying organization for Credit Union membership. This enables our members and their families to take advantage of the organization's financial products and workshops. Additionally, their offices in Northampton and Hadley have meeting rooms that we will be able to reserve and use for meetings and programs.

After being based in Smith College's Mason Hall for many years, LIR relocated its office in March as its former quarters were about to be razed. Thanks to the generosity of Smith College and Five Colleges, Inc., we established our new space amongst the Emeriti Offices in Neilson Library with minimal disruption and cost. The new location has the advantage of access to a comfortable lounge where we can hold committee meetings, work on office projects, or simply relax with one another.

We held a gala party in April to celebrate our 25 years of activities. Over 125 members and guests gathered at the Hadley Farms Meeting House for a delicious dinner followed by musical entertainment by local *a cappella* group, Green Street Brew. Five Colleges Treasurer Barbara Lucey presented us with a certificate from the leaders of the five colleges and the Five Colleges, Inc. Executive Director, and State Senator Stan Rosenberg honored us with an official Senate citation. We each received the results of a member survey conducted by Chuck Gillies and Hy Edelstein and a scroll highlighting 5CLIR's history prepared by Historian Sara Wright.

All this change occurred in the midst of a year of continuity: we maintained our practice of offering some 2 dozen seminars each semester on a wide array of topics, organized a host of trips and programs to meet varied interests, held a well-attended annual meeting, and organized 2 special sessions -- managed by the Curriculum Committee -- to assist moderators and prospective moderators. These and other achievements are explained in greater detail in the accompanying committee reports.

Our accomplishments were all made possible by the remarkable group of volunteers who comprise this organization: the Officers, those who serve on Council, who chair and serve on committees and who just show up to help. Their work is complemented by Liz Tiley's creativity and dedication. A full description of who we were and all we achieved constitutes the body of this report. We remain a unique and vibrant organization with a wealth of opportunities to offer Pioneer Valley residents. I have no doubt that incoming President, Michael Greenebaum, will maintain and expand our record of success throughout our 26th year.

Carol Jolly, President

VICE PRESIDENT'S REPORT

I assumed this office, quite ignorant of the workings of Learning in Retirement since I had not served on Council or on a committee. Since the vice-president's job is principally the oversight of the committees, this was an important learning year for me. I thank the committees for allowing me to sit in on their meetings and even participate, when appropriate.

It was an impressive pleasure to watch the Great Decisions committee organize itself after the unexpected death of its chair. I realized that for it, as well as for the other standing committees, a clear structure and set of procedures serves well to provide continuity from year to year as committee membership changes. By the end of the year, Great Decisions chair Fran Volkmann had created an operations manual for that committee. I think it could serve as a model for other committees.

By the end of the year, it became clear that not all committees were following — or even aware of — the bylaw strictures on term limits for committee chairs and members. When I reminded them of the limits, distress in several committees ensued. Some committees successfully reorganized, some requested - and received - extensions of their terms, and one - the PR committee - was more or less suspended, pending reorganization.

I think it is important for LIR's health that our standing committees have a flow of new members, especially members who are new to LIR. This means that term limits should be observed and that committee processes should be created to take them into account. It also means that LIR's procedures for recruiting new members should be examined and clarified. I recommend that committee sign-up sheets should be included in the packet of materials for both fall and spring previews. Further, I recommend that it should be the sitting vice-president who receives these sheets and notifies both the volunteers that we have received their sheets with thanks and the committee chairs of the names of those who have requested their committees. (This is a change from the current procedure which gives the vice-president-elect this responsibility in the spring.)

I gained an important education last year, and it is continuing this year. Our status as a volunteer organization is a source of our strength, but also a possible source of some fragility. Perhaps "eternal vigilance" is too dramatic a charge, but it should continue to be the Vice President's responsibility to help the committees stay strong and to be alert to any signs of trouble ahead.

Michael Greenebaum, Vice President

SECRETARY'S REPORT

I attended and took Minutes at all Executive Committee meetings, Council meetings and the Annual Meeting. Corrected copies were sent to our office manager, all Council members, all committee chairs, and any visitors who attended the meetings.

One unusual event occurred when the nominating committee constructed its slate of officers for the next year and asked me to stay on as Secretary. All of us had forgotten that the Secretary's position has a term limit of three years. When this oversight was brought to the attention of Council by our historian, I withdrew my name from consideration. A volunteer came forward and was duly elected. However, after attending the June meeting, which led her to understand the complexity of Council discussions and the commuting distance from her home, she resigned her post. I agreed to fill in for another year at the request of the Executive Committee and with the approval of Council. This hiccup in procedure occasioned discussions of whether term limits for officers and committee chairs are useful and desirable.

Ellen Peck, Secretary

TREASURER'S/FINANCE COMMITTEE REPORT

The major task facing the Finance Committee this past year has been to develop some meaningful reports from the data provided by Five Colleges, Inc. Their new software package has made it possible for us to track income and expenses in a more detailed way than was possible before. With the help of a computer consultant, we developed an income statement that reports monthly progress on our budget. Much of the year was spent revising the categories, and developing a fiscal year report that runs from May 1st each year to April 30th of the following year. With that new reporting method, we reported to Council that we ended the year with a slight operating deficit (\$1,131.65). The primary cause was the hiring of a new office administrator who took a higher-cost benefit package. Because of that expense we recommended an increase in dues to Council. Despite that deficit, 5CLIR remains in a healthy position. Our Future Fund endowment increased by \$5,608 due to a positive stock market, and we retained a healthy reserve in addition to this amount.

In addition to reviewing reports at each meeting, the Committee provided advice to Council on several topics. We made a recommendation on the cost of the 25th Anniversary dinner, recommended a process for handling any surpluses that happen due to summer or winter programs, and began a discussion on partial year dues payments. Many thanks to the Committee members who served this year:

Betsy Loughran, Treasurer

Susan Beer, Assistant Treasurer

Chuck Gillies, Jim Perot, Sandy Belden, Carl Erikson, Johan Brongers

OFFICE MANAGER'S REPORT

I joined the Five College Learning in Retirement program at the start of the 2013-2014 year. The year began with an intensive week of training from retiring office manager, Callie Orszak, who generously offered her continued support and friendship to me throughout the year. Callie taught me a tremendous amount in a short period of time and that, combined with the steadfast guidance of President Carol Jolly, simplified the transition. The welcome, support and gratitude for my work expressed by 5CLIR members made my first year in the organization truly a pleasure.

After becoming familiar with the program, I redesigned 5CLIR's online presence as well as its print publications. I augmented the organization's outreach by sending newsletters to Five Colleges, Inc., as well as catalogs with thank you letters to all academic and community partners hosting our seminars. I also spoke at an OBND (Out, But Not Down) meeting of retired Smith College faculty, and created posters announcing membership events open to the public for five college human resource departments, retirement communities, libraries and local alumnae groups.

In order to provide more administrative support, I used the database to automate the lottery process for the Curriculum Committee and track registration lists for the Winter/Summer Programs Committee events. To protect members' financial information, I provided spreadsheet lists of checks rather than check images when submitting electronic financial transactions. To make the history of the organization more accessible to members, I scanned and uploaded archives of catalogs, newsletters, annual reports and Council minutes. To help advertise the Great Decisions program to the general public, I created online tickets through Eventbrite. And to keep the LIR members (current and future) informed of local nonprofit events of interest, I created an online bulletin board.

I look forward to the coming year and continuing to further 5CLIR's mission with this remarkable group of retired volunteers.

Liz Tiley

CURRICULUM COMMITTEE

During this year, the committee worked with members to offer 25 seminars for the fall 2013 Semester (with 3 seminars being cancelled for lack of sufficient participation) and 24 seminars for the spring 2014 semester (with 2 seminars being cancelled for lack of sufficient participation). Previews were offered in November and May, with a special note that LIR's new Office Manager, Liz Tiley, devised a way to print the Preview packet in a beautiful new format, that is much more "professional" in its presentation. Thank you, Liz!

The committee made some special efforts to examine the work of the committee, with a view to updating a number of its procedures, specifically:

- Discussed the updating of seminar proposal forms, so that all are consistent and use the same format - online and in print; Liz will be working on finalizing these, online and in print.

- Updated the procedures for processing seminar proposals, so that all seminar proposals are first sent to all Curriculum Committee members, in their original forms, to be read and critiqued at committee meetings; then a liaison committee member is chosen to work with each moderator offering a seminar proposal to refine it and re-submit it to the committee for final approval. The proposals are then sent to Liz, for formatting each proposal to suit her format for the Preview Catalog.
- Focusing each of the two annual Moderators' Meetings on a different aspect of the task - the Fall Moderators' Meeting focused on helping new/current moderators to do their best possible job, and the Spring Moderators' Meeting focused on Potential Moderators and encouraging more LIR members to become seminar moderators
- Eliminating the Special Status category of seminar participation, leaving any "special" situations to the moderator and the individual making the "special" request.
- Agreeing to create a policy that participants in a seminar that continues a topic in subsequent seminars will not have any advantage in requesting participation in that subsequent seminar. This will be submitted to the Council for approval, asking that it be placed in the Procedures Manual.
- Emphasized and added to the LIR Procedures Manual the idea that seminars can be/should be implemented with a wide variety of structures, in addition to the usual written presentation presented orally
- Re-arranged the dates, in LIR's annual calendar, so that the deadline for seminar proposal submissions is moved to the week before a Curriculum Committee meeting. This was done to provide committee members with the opportunity to have all the proposals in hand, to evaluate and discuss them, as a committee, before they are refined and altered for final approval by the liaisons, in tandem with the moderators making the proposals
- Liz devised a way of doing the Lottery with a computer program that she developed, so that it will no longer be necessary to have individual committee members spent many hours doing this manually, for which we thank Liz enormously
- Discussing at length and passing on to the Council the issue of who should get his/her first seminar choice, before the choices of "regular" LIR members are fulfilled. It has been brought to the committee's attention that there is a growing number of LIR members being offered the special privilege of getting their first choice seminars.

This was a particularly productive year with many updated changes in the committee's functioning, thanks in particular to the hard-working members of the committee.

Betsy Siersma and Marybeth Bridegam, Co-Chairs

Anne Lombard, Don Maiocco, Ray Moore, June Guild, Larry Gutlerner, Sheila Klem, Richard Szlosek, Dean Poli, Diane Liebert, Miriam Whitney, and Jean Miller

SPECIAL PROGRAMS COMMITTEE

Special Programs had a successful year starting with 10 interest groups including two language conversation groups -- French and Italian, Travel Interest Group, Book Interest Group, Science Roundtable, Finding Family, Viewpoints, Encore and Friday Lectures, Opera Preparation, and Dine Around (formerly Ethnic Eating). The Live Performances Facilitator stepped down at the beginning of the year, and no one replaced her, so updates on performances were not given this year. During the year, one program, Italian Conversation, ceased and three others were introduced: Music, Valley Poets and Writing Your Own Obituary, ending the year with 12 programs. Writing Your Own Obituary offered several sessions for the spring semester only, and will not be offered in 2014-2015. Valley Poets was offered as a one-time event; its success has led to a proposal to continue an annual poetry event.

Special Programs committee members are liaisons to individual programs and provide updated information twice a year that is included in the Fall and Spring Catalogues distributed at the Previews. The facilitators, who manage and present each Special Program, are particularly appreciated by the committee and attendees for their time and effort.

Generous hosts for our programs are Applewood and Northampton Lathrop retirement communities, Highland Valley Elder Services, Smith College, and the Newman Center at the UMass Amherst. The Special Programs Committee appreciated the use of a room at 5 Colleges, Inc. for our meetings.

Diane Liebert, and Ina Luadtke, Co-Chairs

SUMMER/WINTER COMMITTEE

This Committee has only two meetings a year. In the early spring of 2013 we had our meeting to organize summer 2013 activities. At that meeting we decided that the LIR Picnic, which is held in early fall, should not be part of this Committee's duties. The Council agreed to transfer responsibility for it to the Member Services Committee which graciously agreed to take it on.

Summer 2013

Early in May, LIR members joined Marybeth Bridegam in a visit to the Philadelphia area where the weather was perfect for visits to the gardens of Longwood, Chanticleer, and Winterthur – all in their finest spring array of blooms. Other attractions on the overnight trip included Kuerner Farm, a frequent subject of the Wyeths, the Brandywine Museum, and Bryn Athyn Cathedral, built for the Swedenborgian president of Pittsburgh Plate Glass.

“Let's Play” proved to be a popular summer activity, as did a fern walk at Acadia Wildlife Sanctuary led by Anne Lombard. The Japanese Garden at Amherst College drew a large number, even though that program had been offered a number of years earlier. An offering, *Lend Me a Tenor* at New Century Theater was popular, as was a trip to Chester Theater for *Tryst, a Play*, A journey to the newly refurbished Yale Art Gallery proved to be a hit as well. Tanglewood is always popular with our members. A sold-out, narrated cruise on the Connecticut River unfortunately had to be cancelled because of high flood waters.

Winter 2014

Possibly because it had been offered the previous winter, our first program "Let's Play," did not have enough registrants to run. Mah-Jongg did have enough to provide 8 new learners with skills to play the game. *Les Miserables*, an Amherst Leisure Services production, attracted 38 people. A tour of the Mount Holyoke College Art Museum with the new Director attracted 62 people. Fortunately, he offered to do two tours. We gave a donation of \$35.00 to the Museum for this. We appreciate having some revenue beyond expenses for such purposes. The *Boar's Head Festival* in Springfield attracted a small group to this nationally known production. Members also enjoyed a production of Kurt Weil's opera, *Street Scene*, and a concert by *Ars Cantorum*. Despite a major snowstorm, a movie and discussion of the East German film *Toxi*, drew about twenty viewers. Our annual Legislators Forum was also a success.

Ruth Kosiorek and Honore David, Co-Chairs

Rachel Black, Kate Collins, Marybeth Bridegam, Candy Carlisle, Arnold Friedmann,
Flora Majumder, Ellen Peck, and Sandy Young

MEMBER SERVICES COMMITTEE

The Member Services Committee has functioned in the past year with six members. Special thanks go to Sheila Klem for her very active "adjunct" status in the work of our committee this past year.

The Committee began meeting in August to plan its first event of the LIR year, the always-popular Fall Potluck Picnic, held again in the beautiful garden of John and Gail Gaustad. The event was well attended; each new member was invited by a phone call and a large number of them came. In February of 2014 we organized our traditional New Members' Coffee, held at the Northampton Lathrop Retirement Community. Planning soon followed for LIR's 25th Anniversary Gala, chaired by Sheila Klem, which was an exceptional addition to our normal agenda.

We will be meeting in December 2014 to plan the next New Members Coffee to be held in February of 2015 at the Loomis Retirement Village, as well as our all-membership lunch gatherings in the spring.

Joan McKelvey & Henia Lewin, Co-Chairs

GREAT DECISIONS COMMITTEE

Using materials from the Foreign Policy Association, the Committee sponsored five morning-long sessions during spring, 2014. This year's topics and speakers were:

March 28:	Food and Climate	Paul Wetzel, Smith College
April 4:	Energy Independence	Regine Spector, UMass
April 11:	China's Foreign Policy	Kate Hartford, Independent Consultant
April 18:	Islamic Awakening	Philip Khoury, MIT
April 25:	Turkey	Hasan Kosebalaban, Mt. Holyoke College

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.

2014 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 in the 70s. We attribute the stable numbers to a wide-ranging publicity campaign that included a brochure, information placed in LIR materials, and announcements in a number of local media sources.

The total cost was \$3,979 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 \$3,660, which included books and tickets sold. Thus, the program fell short by \$319. This shortfall is attributed to a new publicity effort, placing an ad on screen at Amherst Cinema, that the committee has judged was not worth the cost, and a failure to collect sufficient funds to cover the expense of coffee at the sessions. The committee already has plans to remedy the shortfall in 2015.

The sessions have continued to suffer from problems with the audio-visual system. Attendees at the sessions were vocal in their criticisms of this aspect of the program. The committee will tackle these issues for the coming year.

Fran Volkmann, Chair

Joan Cenedella, Jake Greenburg, Larry Gutlerner, Jim Harvey, Chris Hurn, Susan Lewandowski, and Jim Perot

TECHNOLOGY COMMITTEE

The Technology Committee held a Technology Fair in January 2014 on Cell Phones and Tablets. The Committee also worked with the Office Manager on the selection and installation of a new printer/scanner for the LIR Office.

Jim Perot, Chair

FIVE COLLEGE LIAISON

The Liaison to Five Colleges, Inc. is expected to maintain communications with the 5CI Executive Director and his staff. As in previous years, I scheduled a meeting between outgoing President Carol Jolly and the new 5CLIR President, Michael Greenebaum, and Neal Abraham, the 5CI Executive Director. During the course of the year, various issues arose that needed the attention of both groups and I attempted to facilitate the process. This past year went very smoothly.

Lawrence Ambs, Liaison

HISTORIAN

The Historian created a scroll describing LIR's past to distribute to each attendee at the 25th Anniversary Gala. It began with "Highlights of Twenty five Years" and recognized 59 members who served in one or more office and 81 members who had been chair of one or more committees for a year or longer. Special thanks was expressed to all members who served on a committee or Council, acknowledging that their work had made 5CLIR a success and had preserved and enhanced it for us to enjoy today. The document included an excerpt from a 1995 presentation to Council, "A look back as we step forward; looking ahead to consider ways in which our organization can further develop." It closed with "Occasional Literary Invocations" by LIR members.

Sara Wright, Historian

OMBUDSMAN

Two members of LIR have contacted me this year with problems. In both cases I felt that the problems were resolved following conversations with the various persons involved as well as with others who were aware of the situations.

Anne Lombard, Ombudsman

FIVE COLLEGE LEARNING IN RETIREMENT ANNUAL MEETING

April 27, 2014

Smith College Campus Center

Call to Order: The meeting was called to order at 1:30 by President Carol Jolly.

Minutes: The minutes of the 2013 annual meeting were approved as presented.

Treasurer: Assistant Treasurer Susan Beer announced that the dues for next year will be increased from \$225 to \$250 for full members. Other levels are \$100 for Associate and Trial members, \$125 for discounted members, and \$145 for spring only members.

This dues scale was decided on by the Finance Committee and approved by Council. Our expenses have increased this year by 6%. Susan pointed out that our dues have not been raised in four years. She then showed a chart prepared by Chuck Gillies that compared our dues over the years to the inflation rate. We are still under what would be expected from inflation.

The Finance Committee—composed of Betsy Loughran, Susan Beer, Michael Greenebaum, Jim Perot, Chuck Gilles, Sandy Belden, Carl Erickson, and Johan Brongers—agreed that LIR needs to operate with a balanced budget. Since we are under the financial umbrella of Five Colleges, Inc., we must use their salary and benefit rates in constructing our budget. Using the new dues figure, the Committee has proposed a budget with:

Income for 2015	\$62,945
Expenses for 2015	\$62,650
Surplus/Deficit	\$ 295

Nominating Committee: The Nominating Committee, composed of Elizabeth Armstrong, Diane Liebert, Gordon Wyse, Fran Volkmann, and Jim Perot presented the following slate for officers:

President: Michael Greenebaum	Vice-President: Sheila Klem
Secretary: Ellen Peck	Treasurer: Betsy Loughran
Assistant Treasurer: Susan Beer	

There were no further nominations from the floor.

Council Elections: Carol Jolly announced the nominations for Council which have been made by the individual seminars. The nominees stood up to be recognized.

Jim Averill	Prunella Fiddian-Green	Miriam Moss
Marybeth Bridegam	Pat Jorczak	Neil Novik
Carl Erickson	John McDermott	Tyll van Geel
Rafe de Lima	Sherri Meade	

Ballots will be sent out by mail to all members.

Committee Chairs: Since our organization depends on volunteers, Carol Jolly recognized the committee chairs and urged members to join the various committees.

Curriculum: Marybeth Bridegam and Betsy Siersma

Finance: Betsy Loughran

Summer/Winter: Honoré David and Ruth Kosiorek

Special Programs: Diane Liebert and Ina Luadtke

Public Relations: Joan Wofford

Technology: Jim Perot

Great Decisions: Fran Volkmann

Five College Liason: Larry Ambs

Historian: Sara Wright

Ombudsman: Anne Lombard

Presidents' Remarks: Michael Greenebaum praised the work of the committees and their volunteers. He was particularly proud of our Gala celebration which congratulated LIR for its uniqueness. He told us about the regional conference of learning in retirement groups which will be held at U. Mass. from June 1 to 3. As a preview he read an excerpt from a handout, written by Ellen Peck, which describes the theory behind Peer-Led Learning.

Michael also praised our new office manager, Liz Tiley, for her creativity and imagination. He gave special thanks to Betsy Loughran and Susan Beer who have been working hard to sort out our finances, and congratulated our outgoing President Carol Jolly for presiding over a smooth but eventful transition year in which our office changed personnel and location.

Carol Jolly, our outgoing President, congratulated Sheila Klem and her committee for arranging the 25th Anniversary Gala. She showed the Citation which LIR received from Senator Rosenberg and the Certificate of Appreciation presented by Five Colleges, Inc. She also thanked the Council for its leadership during the past year. Finally Carol made another plea for more committee volunteers.

The meeting was adjourned at 2:00.

Respectfully submitted by Ellen Peck, Secretary

OFFICERS AND COUNCIL MEMBERS

Officers:

President -- Carol Jolly

Vice-President -- Michael Greenebaum

Past President -- Jim Harvey

Secretary -- Ellen Peck

Treasurer -- Betsy Loughran

Assistant Treasurer -- Susan Beer

Council:

Terms Expire June 30, 2014

Dorothy Gilbert

Chris Hurn

Gordon Wyse

Terms Expire June 30, 2015

Jim Scott

Jim Perot

Paul Berman [Resigned]

Terms Expire June 30, 2016

Dean Poli

Zina Tillona

Fran Volkmann