

PLANNING FOR THE FUTURE

FIVE COLLEGE LEARNING IN RETIREMENT PROGRAM

A LONG RANGE REPORT

I. INTRODUCTION

To better deal with its decisions for the future, the Five College Learning in Retirement Program initiated in early 1994 six special Task Forces and a Coordinating Committee to develop a Long Range Plan to assess the key issues to be faced within the next few years. The Task Forces focused on the areas of governance, curriculum, membership, newsletter/publicity, finance, and special events and community service. During the spring, these groups met several times and shared their findings and suggestions with the Coordinating Committee. They also submitted their written reports. A voluntary questionnaire was also given to all members in June of 1994. As convener of the Coordinating Committee, I am serving as "Compiler" of the various materials submitted as well as of some of the views of the Coordinating Committee. What follows are the major issues, a series of questions that have been raised, and items for future consideration by the Council, Officers, Staff, and Members. Generally, they are arranged by Task Force areas.

To avoid undue length, sources, citations, and attributions have usually been omitted. A few notes are included in the appendix. Most of the material is reported as rough consensus; neither the Task Forces nor the Coordinating Committee took formal recorded notes. [I have taken the liberty to include some of my own observations in brackets. RFG, compiler]

II. THE MAJOR ASSESSMENT

The most wide-spread evaluation and comment about the LIR program in the Pioneer Valley area from group after group, individual after individual, underscored the importance of peer learning and peer participation at the core of our activities. Just as strongly they endorsed the high quality of our seminars and the unique enjoyment and value such have provided for their members. Seldom does one encounter such a strong and uniform endorsement of learning experiences. Great appreciation was expressed for those who planned, led, and participated in the almost 100 seminars that have already taken place since 1989.

III. MEMBERSHIP

A. Main Issues.

1. Nature. The requirements for membership are simple: "those persons whose application for membership have been completed and who have paid their membership dues." (Note 1)

Moreover, there continues strong support for 5CLIR to remain a membership organization where each individual member has access to all the activities of the organization, rather than to form a group which functions solely on a "user fee" or "fee for services" approach (Note 2). It should also be

5CLIR's policy: a) to provide "an opportunity to all retired and semi-retired people in the Five College area who would wish to participate in a retiree directed, peer learning program"; b) "the program will not be diluted in essential content to attract the maximum number of members"; and c) that we attempt "to attain as much cultural and racial diversity as possible in membership". (Note 3)

2. Size. There is a growing concern that the number of members in 5CLIR may be declining, after several years of steady growth. The Membership Task Force recommended a total membership of 150-175 in its Spring Report. The current number of members is approximately 130. A larger membership for 5CLIR could likely have such advantages as: a) greater resources for selecting moderators; b) more diversity in member interest; c) a better financial base; d) more chances for minority members; e) use of bulk mailing rates; f) an increased breadth of seminar offerings; and g) more special activities. Efforts to reach new members have begun, but it may take greater efforts in the future.

3. Encouraging New Membership Candidates. There is some concern that perhaps our static size, or even shrinkage, may reflect a failure to tell our story throughout the Pioneer Valley clearly and widely. Moreover, are we reaching and are we making welcome Valley retirees who are interested in life-long learning but who do not happen to have any connections with the Five Colleges or other academia?

B. Other considerations

1. Recruiting Possibilities. As 5CLIR begins the fall of 1994, there appears considerable interest in increasing the membership at least by 10 to 20%. The Task Force Report on Membership suggests: 1) increased and effective recruitment one-on-one of minority retirees, and of others; 2) use of local alumni/ae mailings; 3) use of faculty newsletters at the area colleges; 4) registration with Speakers' Bureaus; 5) visibility through newspaper publicity; 6) information at area towns' Senior Centers; 7) new 5CLIR brochures (Note that a new brochure has been completed in September); 8) notices in the Five College Notes/Bulletin; and 9) paid advertisements in area newspapers, including those at the University and the Colleges. The membership committee will later be able to evaluate the results of several of these efforts.

2. Duration. The beginning and ending dates for the Membership year have sometimes in the past been varied. Their critical interactions with the fiscal year, seminar registration dates and seminar lottery dates will require some careful analysis and might possibly result, as suggested recently, in a membership year longer than twelve months.

C. Membership Variation And Needed Data. [The following sections 1-5 are put forth by the compiler.]

[1. With the more flexible possibilities of financial refunds and/or "single semester" members occasionally occurring, we do need to clarify definitions of our data and of our mailing lists. Clear and consistent reference dates for member counts should be established for each semester.

[2. There are other categories of individuals whose data could usefully be gathered and maintained, namely: a) those who no longer are paid-up members, b) those who attend only the "special events" in January and/or the

summer or during semesters and, and c) those making inquiries but who are not yet members. Tallies of these need to be maintained separately from paid members. Policies need to be established for including each group in the mailings.

[3. Currently no individual records are kept for members. This makes planning difficult since we have no cumulative information about what seminars have been taken by each member, the patterns of registration, who have been moderators, and who have been on what committees. (This could fairly easily be remedied with an expanded recording and computer system.)

[4. The question of the size of the present fee for membership is sometimes raised. We have only meager evidence as to those who have dropped out or who have not chosen due to financial factors. In the recent survey only a single individual raised the issue, but we did not survey non-members. (Scholarship support can and has been used, but infrequently.)

[5. There is need for continuing studies in the realm of membership and its characteristics. The June 1994 survey was quite limited and failed to solicit many useful personal characteristics. There is some evidence, none the less, that we are not adding new members very rapidly, i.e. only 13% of the first 45 returns have been members for less than two years.))

IV. CURRICULUM

Seminars. Without a doubt the seminars, their proven success, high quality, fine leadership and willing participants are the hallmarks of 5CLIR. They will remain the core of the program. It will be a challenge to maintain the excellent nature of these learning experiences over the semesters to come, but what we have already learned about our planning and scheduling should be very helpful.

A. Moderators. The volunteers who lead the seminars as well as suggest their topics are essential components of the program. Potential moderators submit their plans for their seminars and describe their nature prior to member enrollment. The moderator fulfills challenging roles in encouraging members of the group, in presiding at sessions, in serving as a resource person, and especially in integrating the members' contributions into a coherent whole. The Curriculum Committee is asked to insure a supply of effective moderators and hence, seminars. The Committee extends the invitation for moderators and/or for seminars, selects from the applicants, searches for moderators (both before and during the seminar) and communicates to members. The obligatory meeting of a small sub-committee of the Curriculum Committee to aid each new moderator was praised. The existing useful Handbook for Moderators should become more widely known and used. The Task Force on Curriculum also cited the possibility of workshops for moderators and potential moderators, but did not favor study groups selecting their own moderators. In general, the advice the Coordinating Committee received about seminars and moderators, despite several suggestions for improvement, strongly emphasized "stay the course".

B. Seminar Topics.

1. The Curriculum Task Force noted considerable discussion as to whether LIR courses "should be limited to specifically academic subject matter or may they appropriately encompass and reflect a wider range of interests..." The majority (of the task force) agreed that there is room for a range of

subject matter and approaches and that such a range enhances prospects of increased membership.

2. The special difficulties of planning seminars in scientific and technological fields plus recruiting members to such seminars were recognized. Special attention will be needed in the future.

3. In 1989 the Division of Continuing Education, University of Massachusetts, polled Five College retirees. The 434 responses provided a useful tally of fields for study groups (seminars). This year may be a good time to repeat that distribution by asking the identical questions of our members in 1994 and 1995. (See Appendix III, Table 1.)

4. In progress also is a full listing of past 5CLIR seminars, their moderators and numbers of participants. This can be of considerable assistance to future Curriculum Committees in building each semester's offerings.

5. From the first 45 returns of the June 1994 survey the seminars "liked the most" were Autobiographical Writing, Shakespeare, American Antiques, the 21st Century, Middlemarch, and Arts and Artists. (Also, votes of one or two members each listed 37 additional seminars as best!, a rewarding index for the proportion of seminars judged excellent by some members.) When asked to suggest what seminars "You would like to see offered?", Architecture and Poetry lead the field, 29 mentioned what could roughly be termed arts and humanities, and 6, science and technology.

6. The possibility of brainstorming sessions by members to suggest seminar topics, the inclusion of both sequential and repeat seminars, provision for moderator workshops, the challenges of finding seminars in science and technology were noted by the Task Force. It also recommended "the role of the Curriculum Committee vis-a-vis seminar moderators should be one of support, not screening."

7. An early concern about possibly "duplicating the offerings of the Five Colleges" appears to have evaporated. The clientele, treatment, and approaches are sufficiently different that no known conflict has arisen.

V. SPECIAL ACTIVITIES, ACTIVITY GROUPS, AND SPECIAL EVENTS

A. Assignments. The Special Events and Community Service Task Force called for a division of the areas assigned them into (at least) four foci: placing the encouragement and development of special events and special activities into a committee with these functions alone (not yet specified were possible temporal divisions of winter, summer, and term-times, nor the relationship to the Curriculum Committee); 2.) reassigning hospitality functions to the Membership Committee; 3.) forming a task force or committee to evaluate how 5CLIR might make use of such opportunities as the PBS adult learning series and 4.) establishing a separate sub-committee to examine the roles of both 5CLIR and its individual members in participation in community services, especially as they relate to providing peer-learning experiences. Although the 1st and 3rd tasks are inter-related, two separate groups could possibly be more efficient. Both would need liaison with the Curriculum Committee and Special Activities Committee.

B. Special Events and Special Activities. The rich offerings of field trips, theater visits, special lectures, workshops, opera study, and more have become a hallmark of 5CLIR in January and in the summer. [The past attitudes toward new experiences have sometimes been tempered by concern for the need to maintain the specific character and high quality of the seminars, but there now appears to be an openness to try new learning and activities in addition to the core seminars--a reassuring sign in a "maturing" population.] Examples of promising group activities in discussion and learning were put forward by the Task Force. We already have an example in the current Great Decisions Program led by Gladys Rapoport. In this program, members of 5CLIR and guests may elect to attend Friday discussion groups for up to 8 sessions on key policy areas. A briefing book is supplied by the Foreign Policy Association. The program is "open to all who wish to participate in reading and discussion." (In Spring 1993, 49 members participated.) Another example was put forward by Ted and Laura Belsky who summarized the Public Broadcasting System's adult learning programs in which "course offerings, teleconferences, and special presentations" are used to elicit a sequence of discussions via satellite programming or by video tape series. They have offered to explore what will be needed in funds and/or associate membership in PBS, perhaps through Hampshire College. A detailed proposal will become available to the Curriculum Committee, the Special Events Committee, and the Council, probably later this year.) [We may need to try some new labels to help us differentiate among a) seminars and both b) special activities and c) short-term special events. "Discussion Groups" may suffice for some purposes. Perhaps the general term "activity groups" could denote non-seminar continuing groups of LIR members, for whatever purpose.] Moreover, as the Special Events Task Force writes: "...Special events and...service activities should be consistent with our primary role as a learning center or grow out of the subject matter covered in one or more of our seminars." (c.f. The Task Force's Report for other suggestions.)

The Five College Learning in Retirement Program must continue to respond as it has in the past to the desires and aspirations of its members. The past years have seen an extraordinary wealth of seminars and activities suggested or initiated by its members, whether individually, in groups, or within the committee structures. As the fall 1994 brochure says: "Any member with a bright and communicative idea has the opportunity to share it with his/her peers." The LIR program with the support of the Five College, Inc. "belongs to us, its members."

C. Community Service. The Task Force asked that such a group could "seek out partnerships with other area organizations to sponsor jointly programs in which both organizations have a common interest and in which the Five College LIR has a special contribution to offer." The sub-committee would be further charged to explore what other LIR organizations such as the Elderhostel Institute Network are doing as well as what our own members would like to pursue." Among survey responses and in the Coordinating Committee, the community service dimension did not seem to have a high priority at present.

D. Other Items.

1. The funding of special activities, workshops, discussion groups, and the like should have budgets separate from the seminars where appropriate. Many activities will be able to finance themselves or entail little extra expense.

2. [Data such as numbers of participants, evaluations, and leadership for each of its activities should be recorded in the permanent files.]

3. [Seminars are usually evaluated by each participant. Would it not be helpful to obtain evaluations for special activities, discussion groups, or other events on a routine basis?]

VI. FINANCING, PHYSICAL PLANT AND EQUIPMENT

A. Main Issues.

1. From the onset of the original planning, the individual Colleges and the University have been particularly supportive. The contributions of Five Colleges, Inc., are also varied and substantive in personnel services and in physical space. (Any rental of comparable seminar spaces to those made available to us freely at the colleges in prime time would be prohibitively expensive.) Smith College has continued graciously to supply space for office and meetings. Let us not forget, either, the priceless gift of access to the five superb libraries and their staffs of fine reference librarians. [We might find more ways to extend more credit, recognition and our thanks to these institutions in their key support.]

2. 5CLIR remains a membership organization with an annual fee to include unlimited participation in seminars, workshops, special events*, and activities, trips*, access to libraries, free parking, plus reception of newsletters and Five College calendars. (Some adjustments in fees have been introduced for those who are absent or incapacitated for a semester.)

3. The Task Force on Finance and Physical Plant has included a number of suggestions on definitions, policies, and separation of accounts. One general principle they might highlight is the essential request that all expenditures for seminars and special activities be sent to the Treasurer within a stated time. Clear definitions are necessary too for the summer programs, January programs and visits to theaters, trips, special events, and special workshops. It is important to acknowledge here the essential assistance of Five College Inc. in maintaining our financial data. It is emerging, however, that we need greater detail and, in some cases, different breakouts of funds. This will mean more labor for our volunteers and ideally would be supported by compatible computer software. Responsible stewardship and prudent planning will soon require such specific information.

4. Looking ahead to possibilities of changes in our current physical arrangements, the Finance and Physical Plant Task Force began to explore both requirements and possibilities. The March 14th report lists useful consideration, although no immediate changes are expected. However, increased meeting and luncheon/dinner space may be needed were we to enjoy a significant increase in membership.

* Some trips and activities do entail small or moderate fees.

5. A unique analysis of the localities of 5CLIR members' residences by David Dill established a geographical center in Hadley near the Amherst line; "...a new site in Hadley or Amherst would be considerably more convenient than Northampton to 86% of the membership."

6. The members of the Task Force noted the limitations of the reports of financial matters in the Five College format. Also missing are uniformly gathered numbers of members for the past and current years, by semester and by the entire year. [Similar difficulties have been encountered by the compiler in establishing information about seminars over time, special activities, moderators, registrations in each group, numbers of members, numbers on mailing lists, individual members, and so forth.] Fund accounts need to be classified and end-of-year reporting improved. Scholarship Funds and special accounts should be included in final year end reporting. For budgetary and planning purposes, it will be essential to have comparable data for each semester, each special activity period, and each year.

B. Other Items.

1. It will be helpful if the 5CLIR Treasurer and the Five College Treasurer would forward to Council those items requiring policy decisions and/or areas of activity needing clearer labels and accounting.

2. A small ad hoc group could develop a chart of standard data and items that need to be recorded for each applicable period. Such material could help not only our Officers but also the Council, the Curriculum Committee, the staff, the Finance Committee, and others. [It is inefficient to use different figures for the same entity.]

VII. ADMINISTRATION

A. Governance.

1. General. The Governance Task Force endorsed "the current representative type of LIR organization," but suggested consideration of some changes in procedures to improve its functioning. As in most democratic organizations there are degrees of emphasis and of tradition as to the amount of detail left to the full membership and that amount assigned to the duly elected executive bodies and officers. The Governance Task Force notes, however, that: "As long as we monitor ourselves against any incipient tendency to dominate, and continue to work well together, any friction and misunderstanding that might arise should be amicably resolved." [The compiler noted a general desire among committee members of several differing persuasions to have a "resting period" for By-law changes for a year or two to try out minor variations in procedures without hurrying to change the language of the By-laws until these variations had been evaluated.]

2. Committees. Already cited elsewhere are suggestions for focusing some functions concerning special activities and special events, community work, and hospitality in new committee locations. As for committee memberships, the data show that this year thirteen members serve on two committees with four members on three committees each. Could there be some suggestions to reduce overlap and encourage broader participation?

3. Officers. The topic received almost no comment or suggestions for change.

4. Elections. After some discussion,, the Governance Task Force recommended the "the task of the Nominating Committee be expanded to develop a slate of both Officers and Council Candidates...use of the various seminars as mini-nominating committees is not the greatest plan." [Although not stated explicitly, we need to decide whether only a single slate regularly be put forward or whether numbers of nominees to twice the number of vacancies be required.]

Furthermore, the Task Force suggested that a) only one member of the Council need be on the Nominating Committee and that b) all members be encouraged to suggest possible names to the Nominating Committee prior to the announcement of the slate and a brief resume for each candidate be made available before the election.

B. Staff. Although there was general support for and admiration of our part-time office staff, recently the Five College Treasurer has broached the subject of a future professional coordinator for the 5CLIR program. Such an individual could supposedly provide continuity and knowledgeable program development. [Currently, our small size and limited finances would not yet allow such a position.]

C. Coordination, Communication, and Calendar.

1. Coordination and Communication. There is concern about the ease and quality of communication between the Council and each of the Standing Committees. One possibility to be considered would be the selection of one member of Council to sit in on each Standing Committee as a liaison person. An alternative view wishes to explore how the Chairs of Standing Committees themselves might be better integrated into the Council body. [The Governance Task Force currently favors the first approach.]

2. Calendar. If a complete calendar for the following year could be worked out in advance and mailings coordinated, the Nominating Committee could solicit nominations for the various officers and Council members from the membership. Plans and scheduling for added nominations and for mail ballots could be reasonably scheduled. Scheduling times for payments of member registration fees, lottery drawings, and seminar dates a year ahead could assist the Treasurer and the Curriculum Committee especially. [The current Chair of the latter already has built a very useful semester by semester schedule for key dates for activities related to the seminars.]

VIII. NEWSLETTER/PUBLICITY

There was general acclaim of the value of the Newsletter. Moreover, the new brochure (September, 1994) was also highly praised. At one point someone questioned whether a single monthly membership mailing might be a useful venture especially if the size of our membership increased. The expanded program of publicity as a collaboration of Membership and Publicity Committees appears promising.

IX. MISCELLANY

A. Additional Functions for 5CLIR. When the Five College Coordinator

reported in May, 1988, the Colleges' and University's approval for us to begin the pilot program that has become the Five College Learning in Retirement Program, he also asked our predecessors and therefore ourselves: "b. to create and disseminate an inventory of significant opportunities for retiree learning that are offered by the five institutions and by other organizations in the Pioneer Valley" and "c. to prepare recommendations on the accessibility of additional programs that might be conducted under the aegis of Five Colleges and undertaken on a number of different campuses." [It would appear to the compiler that these two charges are still relevant and might be undertaken to the benefit of both 5CLIR and the Five Colleges.]

B. Affiliation. Affiliation with other groups is not a high priority. The Elderhostel Institute Network (EIN) does seem worthwhile.

C. Data and Records. [We could benefit considerably from the development of standardized data collection and stronger more complete historic records. Cumulative records of each individual's participation will be useful for planning.]

X. SUMMARY

Through several months in the spring of 1994, and into the summer, some seven committees or task forces of Pioneer Valley's Five College Learning in Retirement Program met to examine the program's past accomplishments, its current activities, and especially its goals and plans for the future. Without dissent, the groups entitled "seminars" were endorsed as great successes and no change was prescribed for them. Secure in these central, participant, semester seminars, some members suggested expanding peer study to new possibilities such as Discussion Groups on topics of the PBS videos and live broadcasts or other series. (The already effective Great Decisions Program encouraged the exploration in the future of such learning groups.)

The popularity, reputations, and high attendance at the Special Events, Trips, Theater series and Workshops in January and during the summer reinforced these as highly desirable components of 5CLIR.

Increasing membership at a steady rate will be a key need during the next few years. There were conflicting suggestions as to just how we can best foster member participation in the governance of our organization.

Several proposals will need review by the Council but for the time being no immediate change needs to be made in the By-laws. Better records, data, and computer programs were endorsed to aid management and planning. Thorough evaluations of our efforts will continue to challenge us. With the increased size of the program, general meetings will require a new site; some of the necessary inquiries have begun.

The Newsletter, mailings, and brochures are of continuing high quality. Better coordination among committees and a comprehensive calendar are needed. The gracious cooperation at each of the Five Colleges is indeed generous, especially in their superb library assistance and their fine meeting facilities. We are grateful, too, for the many contributions made to us by Five Colleges, Inc.

APPENDIX I

ACKNOWLEDGEMENTS

The compiler, on behalf of the Members, wishes to thank the number of people who have contributed each in his/her own way to this opportunity to look ahead and to help make a fine program even better and more available to others.

Bill Lieson and others had begun the task of planning in 1992; he initiated the current project as President in November, 1993. Eleanor Reid, 1994-95 President, has aided many of us to see old strengths and new possibilities. She formed the planning committee and has urged us to share our views.

Task Forces and conveners were:

- A. Governance Task Force--Paul Rothery
- B. Curriculum Task Force--Marjorie Bennett
- C. Membership Task Force--Ed Buck
- D. Newsletter/Publicity Task Force--Jackie Wisneski, Mary Egginton
- E. Finance and Physical Plant Task Force--Esther Cristal
- F. Special Events and Service Task Force--Ted and Laura Belsky.

The members of each of the Task Forces are listed on their reports on file in the 5CLIR office; our gratitude to all of them. Also thanks to the Coordinating Committee for its lively discussions and perceptive editing: Carl Swanson, George Goodwin, Nicole Dunn, Harley Unger, Bill Lieson ex officio, Jeanne Carritt, and Eleanor Reid. In addition, we thank Jean Stabell, Financial Officer of the Five Colleges. We are also greatly indebted to Karen Tatro, our office expert, for her patient and understanding assistance in many facets of our efforts.

Robert F. Grose,
Compiler and Convener of the
Coordinating Committee

October, 1994

APPENDIX II
NOTES AND REFERENCES

Note 1. From By-laws of 5CLIR, May, 1993.

Note 2. Paraphrased for Membership Task Force report.

Note 3. a.), b.), and c.) adapted from a memorandum from Harley Unger entitled "Defining LIR--A Planning Document," March, 1994. (section on Growth and Size)

General Notes: a) Copies of the Task Force Reports and some of the working papers of the coordinating committee will be on file in the Five College Learning in Retirement office.

b) Table I, which follows, is a summary of responses to a 1989 questionnaire circulated to retirees in the Valley to explore the extent of interest in various fields of study among prospective LIR members.

c) "A BRIEF HISTORY.....," was prepared by Eve Posada for a General Meeting on February 9, 1995, at which the LIR membership was invited to respond to the Planning report. It is attached, together with the minutes of that meeting.

d) RECOMMENDATIONS FOR GROWTH AND PLANNING, a tentative schedule, and assignment of responsibility, for implementation of the long range plan is also attached.

TABLE I
 FIVE COLLEGE LEARNING IN RETIREMENT PROGRAM
 QUESTIONNAIRE
 with Tally

(Note: A questionnaire was circulated to a large number of retirees in the Five College area in early 1989. The responses, below, were tallied by Judy Wardlaw who was then LIR Program Coordinator in the Division of Continuing Education, University of Massachusetts.)

Date: February 7, 1989

1. I would be interested in study groups in the field(s) of:

of Responses

197 -Art	43 -Education	96 -Natural Sciences
67 -Behavioral Sciences	104 -Finance	102 -Philosophy
111 -Computers	75 -Health	33 -Physical Sciences
115 -Creative Writing	183 -History	116 -Religion
133 -Current Events	95 -Languages	66 -Social Sciences
35 -Dance	203 -Literature	7 -Speech
84 -Drama	15 -Mathematics	21 -Technology
86 -Economics	151 -Music	

(Fields listed in order of preference: 1. Literature, 2. Art, 3. History, 4. Music, 5. Current Events, 6. Creative Writing; Religion, 7. Computers, 8. Finance, 9. Philosophy, 10. Natural Sciences, 11. Languages, 12. Drama, 13. Health, 14. Behavioral Sciences, 15. Social Sciences, 16. Education, 17. Dance, 18. Physical Sciences, 19. Technology, 20. Mathematics, 21. Speech.)

2. Study Groups should run for

201 -6 weeks	153 -8 weeks	51 -10 weeks
--------------	--------------	--------------

3. Would you be willing to consider moderating a study group?

Spring 1989 - 41 YES	Fall 1989 - 60 YES
----------------------	--------------------

RECOMMENDATIONS FOR GROWTH AND DEVELOPMENT
LONG RANGE PLANNING PROJECT

Most recommendations can be implemented by the relevant standing committees. However, some new sub-committees or task forces may be needed to hasten the implementation process.

Special Task Forces: Comprehensive Calendar; inventory of learning opportunities; new learning options. New Sub-Committee: Joint Curriculum and Special Events.

Abbreviations: og=ongoing; f=fall; w=winter; sp=spring; su=summer; VP=Vice President; TF=Task Force; KT=Karen Tatro; RFG=Bob Grose and ER=Eleanor Reid.

TASK	WHO DOES IT	WHEN
1.Membership increase	Membership Com.	sp95,og
2.General data standardization	RFG,KT,TF	now,og
3.Curriculum development	Curriculum Com.	og
a.maintain quality & numbers of seminars & moderators		
b.explore other learning options	Special TF	f95
4.Special events/activities	Special Events Com.	now
a.plan & execute special events including summer & winter terms		
b.explore new kinds of learning groups(special interest,etc)	"	
c.arrange trips, etc.	"	og
5.Coordinating/Communicating		
a.between Curriculum/Special Events	Joint Sub-com.	f95
b.Council & all committees	VP	
6.Data, information, definitions in financial area	Finance Com.	og
7.Governance - review functions and assignments of committees	VP & Council	su95
8.Governance - Review election procedures	Council	su95
9.Update By-laws - plan for needed changes	Council	sp96
10.Develop a comprehensive calendar	KT&TF	w95

TASK	WHO DOES IT	WHEN
11. Inventory of 5 College learning opportunities for retirees	Special TF	f95
12. Intergenerational study group	See 3-b (above)	now
13. Monitor above	Executive Com.	og

Prepared by:

Eleanor Reid &
Robert F. Grose

January 25, 1995

<u>TASK</u>	<u>WHO DOES IT</u>	<u>WHEN</u>
11. Inventory of 5 College learning opportunities for retirees	Special TF	f95
12. Intergenerational study group	See 3-b (above)	now
13. Monitor above	Executive Com.	og

Prepared by:

Eleanor Reid &
Robert F. Grose

January 25, 1995

A BRIEF HISTORY OF THE FIVE COLLEGE LEARNING IN RETIREMENT PROGRAM

A group of representatives from the Five Colleges met informally in 1987-88 to explore the possibilities for learning programs for retirees in the Pioneer Valley/Five college area. In May 1988, the Five College Coordinator Conn Nugent approved the pilot program described in the group's request for "an educational opportunity designed and offered by retirees for and to themselves...a program of senior study groups modeled on the Harvard Institute for Learning in Retirement (other programs are also in place at Brown, Duke, and Berkeley) that will draw on the richly endowed intellectual resources of the Valley's retired community and that will enable its participants to study together. Our membership will include those individuals who feel intellectually restless and who are now free to: 1.) pursue new fields of study, 2.) re-ponder old neglected ones, and/or 3.) share and thus reshape familiar ideas with peers of diverse backgrounds and experiences who also remain intellectually independent and alert but who wish to join others in study. ...Peer learning and active participation by members will not only be the intertwined concepts on which this proposed program will rise, but they will also remain integral to it at every stage...."

The Division of Continuing Education at the University of Massachusetts, Amherst, was initially assigned as the administrative agency to help with the beginnings of the program. Dean Miriam Williford and Judy Wardlaw facilitated the first years of the seminars and the initial program memberships, withdrawing in the summer of 1991. In the last three years (1991-92 through 1993-94) the program has functioned as self-administered by retirees themselves and reporting to Five Colleges, Inc.

The program has grown to include 130 to 140 members engaging in 12 to 15 seminars each semester. In addition, more than 20 to 25 additional special events and activities are made available each year in January or in the summer. Eleanor Reid pointed out in her initial January 1994 proposal for a long range study: "Because our LIR is almost unique, self-governing and not related to a parent Continuing Education Department, we have much more responsibility for our survival than do our sister organizations. An important part of that responsibility is to look ahead and plan, in a systematic way, for the future. The critical questions are not only "Where have we been?" and "Who are we?" but also "What do we want to be?" and "What should we be?"

<u>TASK</u>	<u>WHO DOES IT</u>	<u>WHEN</u>
11. Inventory of 5 College learning opportunities for retirees	Special TF	f95
12. Intergenerational study group	See 3-b (above)	now
13. Monitor above	Executive Com.	og

Prepared by:

Eleanor Reid &
Robert F. Grose

January 25, 1995

APPENDIX II

NOTES AND REFERENCES

Note 1. From By-laws of 5CLIR, May, 1993.

Note 2. Paraphrased for Membership Task Force report.

Note 3. a.), b.), and c.) adapted from a memorandum from Harley Unger entitled "Defining LIR--A Planning Document," March, 1994. (section on Growth and Size)

General Notes: a) Copies of the Task Force Reports and some of the working papers of the coordinating committee will be on file in the Five College Learning in Retirement office.

b) Table I, which follows, is a summary of responses to a 1989 questionnaire circulated to retirees in the Valley to explore the extent of interest in various fields of study among prospective LIR members.

c) "A BRIEF HISTORY.....," was prepared by Eve Posada for a General Meeting on February 9, 1995, at which the LIR membership was invited to respond to the Planning report. It is attached, together with the minutes of that meeting.