



MESSAGE FROM THE PRESIDENT

Happy new year of learning! On behalf of the ElderStudy officers, the Board of Directors, and our committee chairs and members, I wish you a happy new year of learning in retirement.

This year has "news." We are in a new classroom at the Stafford Campus of UMW, Room 210, named the Center for Lifelong Learning. We hope you have had the opportunity to visit during our Open House in late August and while attending our first months of classes. ElderStudy appreciates the efforts of the UMW staff in finding us a wonderful venue to continue our sessions. With the help of President Hurley, Susan Knick and many others, we are embarking on a new journey in our new site.

New officers for the 2013-14 year have been elected. I will serve as ElderStudy's president, Mary Ann Stana as vice president, Barbara Barrett as secretary, and John Thompson as treasurer.

Old news but good news. ElderStudy will continue to offer about 40 learning opportunities to our members each semester.

ElderStudy is an organization run by volunteers and we invite you to get involved. You may choose to join one of our operating committees (Administration, Curriculum, Membership.) Committee meeting attendance is open to all and attendance is on a no-obligation walk-in basis. We sincerely appreciate and value our volunteers and they make a fabulous, positive difference. It's not too hard and we all benefit.

Enjoy the autumn,
Bill Toomey

Just a reminder, the **General Membership Meeting** will take place Wednesday, October 16 from 10 A.M. to noon at our new Stafford Campus location. Refreshments will be served and all members are cordially invited.

CENTER FOR LIFELONG LEARNING RIBBON CUTTING

There will be a Ribbon Cutting Ceremony for the Center for LifeLong Learning, Tuesday October 22 from 9 to 10 A.M. University of Mary Washington Chief of Staff Martin Wilder will preside over the ceremony. Refreshments will be served. **All ElderStudy members are cordially invited.** The previously scheduled Web Based Digital Story Telling lecture will follow the ceremony.

ADMINISTRATION COMMITTEE

The Administration Committee, with Board of Directors guidance, develops policies and plans for operating the ElderStudy organization, monitors finances and projects future needs, proposed an annual budget with recommended annual fees, and periodically reviews ElderStudy governing documents relative to potential need for revision or change. The Committee meets quarterly about 7-9 days in advance of the Board of Directors Meetings.

The most recent Committee Meeting was held on August 27 with all 10 members and Mr. William Toomey present. Preliminary year-end financial reports were discussed and approved for presentation to the Board with appropriate updates as necessary for the last four days of August. Plans for the conduct of the Annual Audit were discussed. The next Committee Meeting is scheduled for November 26th at 1 PM in the Center of Lifelong Learning at the UMW Stafford Campus [Room SC210 South]. Questions and comments may be addressed to John Thompson [371-4827 .)

ELECTRONIC NEWSLETTER

We are very grateful that our editor, Dottie Meyers, has once again agreed to serve as editor of this newsletter, and are mindful of the many other contributors including those working behind the scenes, like Chuck Johnson who maintains our membership roster and prepares the mailing list. Although all their hours are volunteered, ElderStudy anticipates spending about \$1,800 on printing and mailing the newsletters this year. That's not a lot of money for the value we get, and yet in looking to be as efficient as possible, the Board of Directors approved a Membership Committee recommendation that we poll the membership to identify those who are willing to receive their newsletters electronically, and to opt out of receiving them via U.S. mail. If you do opt out, not only will you save our organization a few dollars per year, but we intend to send you the e-version as soon as it goes to press, so you'll get your news a few days early. If you do not have the capability to print an occasional page, such as your reservation for the holiday luncheon, it's probably better that you not opt out. Those who do not use e-mail or who would prefer to continue receiving printed copies should not be alarmed, as we anticipate continuing to send hard copies to those with that preference for many years to come.

An e-mail solicitation will be sent out to our membership within the next few days. If you are willing to receive your future newsletters electronically only, simply reply via email to Chuck Johnson with "Opt Out" in the subject line.

RESERVATION FORM

Don't forget to mail in your reservation form for the Holiday Luncheon. The deadline for the reservations is December 2 - but don't put it off too long. We hope to see all of you there on December 11.

TREASURER’S REPORT

The ElderStudy 2012-2013 Year-End Financial Reports for the period September 1, 2012 thru August 31, 2013 were approved by the Board of Directors on September 4 and are included in this newsletter. Electronic copies of the reports are available on the ElderStudy website [http://www.elderstudy.com]. Plans are being made to complete the 2012-2013 Annual Audit before Thanksgiving in order to report the audit findings at the Quarterly Board Meeting on December 4th. If you have questions, please contact the Treasurer (John Thompson) at 371-4827 .

MARY WASHINGTON ELDERSTUDY			
2012-2013 Year-End Balance Sheet Report: Final			
Reporting Period: September 1, 2012 thru August 31, 2013			
Date of Report: September 2, 2013			
Description of Asset or Liability	<u>As of 9/1/2012</u>	<u>As of 8/31/13</u>	
	(a)	(b)	
Assets			
Operating Account			
Wells Fargo Bank Checking Account [Quicken]	\$16,771.89	\$22,683.79	
Capital Reserve Account			
Wells Fargo CD 16084 [1.0%; m 1/27/2014]	\$5,084.68	\$5,135.78	
Wells Fargo CD 16101 [0.55%; m 5/27/2014]	\$5,122.55	\$5,150.80	
Wells Fargo CD 70719 [0.75%; m 6/28/2015]	\$5,126.92	\$5,165.52	
Wells Fargo CD 70726 [1.98%; m 5/28/2013]	\$5,237.64	\$0.00	matured
Total Assets	\$37,343.68	\$38,135.89	
Liabilities			
FY 2011-2012 Budget Expenses Pending	\$60.00	\$0.00	
FY 2012-2013 Approved Budget & Current Status	\$12,650.00	\$258.01	overage
FY 2012-2013 Membership Renewal Incentive	\$2,330.00	\$0.00	
FY 2012-2013 Capital Reserve (\$15,000 min.)	\$20,571.79	\$15,452.10	
FY 2012-2013 Grants	TBD	\$0.00	
FY 2013-2014 Approved Budget	n/a	\$12,250.00	
FY 2013-2014 Classroom Contingency	n/a	\$5,000.00	
FY2013-2014 Membership Renewal Incentive	n/a	\$2,220.00	
Total Liabilities	\$35,611.79	\$35,180.11	
Assets less Liabilities (Net)	\$1,731.89	\$2,955.78	
Treasurer's Notes:			
(a) 9/1/2012 Checking Account is actual per Quicken; CD Information was provided by Wells Fargo.			
(b) 8/31/13 Checking Account is actual per Quicken and includes funds from CD 70726 which matured on May 28 plus 2013-2014 early membership fees; CD information is from Bank Statement for period ending 8/30/2013.			
2012-2013 ElderStudy Membership = 254 including 6 retired UMW faculty			
Respectfully Submitted,			
John Thompson, Treasurer			

Mary Washington ElderStudy				
2012-2013 Year-End Operations Report: Final				
				9/1/13
Accounting Category/Subcategory	2012-2013 Approved Budget (5/31/2012) (#)		Actuals YTD: 9/1/2012 to 8/31/2013	% of Plan
INCOME				
Carry-over from Prior Year	TBD	B	\$7,442.43	
Membership Fees [248//254]	\$12,645.00		\$14,050.00	111.1%
Interest from Checking Account	\$0.00		\$0.00	
Interest from Certificates of Deposit	\$310.00		\$314.91	
Miscellaneous (excludes replacement NameTags)	\$0.00		\$5,000.00	CD 70726 principle
Early 13-14 Memb Fee Income [144//148]			\$8,045.00	
Total ES Income/Revenue	\$12,955.00		\$34,852.34	
EXPENSES				
Board of Directors				
Awards	\$0.00		\$0.00	
BLS Scholarships	\$1,000.00		\$1,000.00	100.0%
Grants (from excess 2012-13 Funds)	TBD		\$2,240.00	(approved 6/5/13)
Subtotal BOD	\$1,000.00		\$3,240.00	
Curriculum Committee				
Speakers/Programs	\$6,500.00		\$5,858.88	90.1%
Postage/Mailing/Copying	\$125.00		\$67.90	54.3%
Off-site Location	\$0.00		\$0.00	
Gifts/Gratuities	\$25.00		\$0.00	0.0%
Stationery/Supplies	\$100.00		\$0.00	0.0%
Telephone Service [12 mos.]	\$150.00		\$132.00	88.0%
Special Activities (net)	\$0.00		\$0.00	
Subtotal Curriculum Committee	\$6,900.00		\$6,058.78	87.8%
Administration Committee/BOD				
General Operating Funds	\$150.00		\$0.00	0.0%
Stationery/Supplies/Publications	\$350.00		\$172.36	49.2%
Postage/Mailing/Copying	\$150.00		\$29.40	19.6%
Subtotal Administration Committee	\$650.00		\$201.76	31.0%
Membership Committee				
Brochures	\$100.00		\$101.26	101.3%
Stationery/Supplies	\$100.00		\$95.40	95.4%
Gifts/Remembrances	\$200.00		\$100.00	50.0%
Name Tags (net)	\$300.00	#	\$301.95	100.6%
Newsletter (preparation/distribution)[5 of 5]	\$2,000.00		\$1,339.39	67.0%
Postage/Mailing/Copying	\$200.00		\$140.61	70.3%
Web Site	\$100.00		\$99.95	100.0%
Telephone Services [12 mos.]	\$150.00		\$132.00	88.0%
Membership Meetings/Spec Events (net)	\$1,200.00	B	\$1,346.91	112.2%
Subtotal Membership Committee	\$4,350.00		\$3,657.47	84.1%
TOTAL EXPENSES	\$12,900.00		\$13,158.01	102.0%

CURRICULUM COMMITTEE

The Curriculum Committee meets several times each semester to plan the sessions for the following semester. We also discuss changes to the current semester's program, and general curriculum-related business. Our next meeting is Tuesday, October 15 at 1 PM in SCS 210.. This is the last meeting planned for this semester.

If you have any suggestions for topics or speakers, or if you just want to see how our committee works, please attend any of our meetings. You are under no obligation to become a committee member, unless you want to.

If you can't come to a meeting, give your suggestions to me or any other committee member at any time.

We always welcome any kind of comments, favorable or unfavorable. We exist solely to benefit you; please help us do that.

Bill Wemmerus, chair Curriculum Committee

BOOK GROUP NEWS

All ElderStudy members are welcome to attend the Book Group sessions on the second Thursday of the month from 1:00 to 3:00. We meet in the new room at the Stafford campus of UMW, room 210. Books are available at the public library, at Barnes and Noble, Amazon.com, or through your Nook or Kindle. These are the books that we will talk about in the next three months. Any questions call me, Dot Meyers at 540-760-1533.

October 10 - The Turn of the Screw by Henry James.
Discussion leader - Larry Turner

November 14 - American Prometheus: The Triumph and Tragedy of J. Robert Oppenheimer by Kai Bird and Martin Sherman
Discussion leader - Chuck Morgan

December 12 - Prague Winter by Madeleine Albright
Discussion leader - Phil Hall

www.elderstudy.com

What you need to know, when you need to know it!

MEMBERSHIP COMMITTEE

Mary Washington ElderStudy welcomes 36 new members, making a total of 225 members as of September 24, 2013. Welcome aboard!

If you need, the membership committee is here to answer any concerns about ElderStudy. Feel free to contact any person on the membership committee either in person, by phone, mail or via the website. If you use the website, click on “contact us.”

- The information line number is 540-654-1769. Leave a message and your call will be returned
- Write to us at MW ElderStudy, UMW, 1301 College Ave., Fredericksburg, VA 22401 and we'll reply.
- Leave a message in the contact box online and we will reply.
- See us in person at a session to chat!

On the website under “Governance” there is a list of names of the membership committee and their responsibility. In this October newsletter, you will receive a directory of the full membership with email addresses and phone numbers,

Important dates to remember

- **General Membership Meeting:** Wednesday, October 16, 10 -12 noon, Room SCS210. Refreshments provided.
- **Winter Luncheon:** Wednesday, December 11, 11:30 -2 Lake of the Woods Clubhouse, reply form included in this newsletter.

Directions to Lake of the Woods Clubhouse:

From Fredericksburg, take Route 3 west 14.5 miles past the I-95 interchange. Turn left at the stoplight onto Lake of the Woods Way. Stay to the left and stop at the gatehouse to get an entry pass. Then continue straight ahead about 0.2 miles to the parking area.

GPS address: 102 Lakeview Parkway, Locust Grove, VA 22508. (540) 972-2222

To find the information on the website, go to the Membership tab and click on the Reservation form. All the information you will need will be on the form.

- **Membership Meeting:**

Wednesday, November 20, 1:30 -3, Central Rappahannock Regional Library, Room 2. Members are always welcome to attend our meetings.

Suzanne Willis, Membership Chair

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**PLEASE JOIN US FOR THE
MARY WASHINGTON ELDER STUDY**

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******* HOLIDAY LUNCHEON*******

Wednesday, December 11, 2013

Lake of the Woods Clubhouse - Rt 3 west, 17 miles from Rt 95

11:30 am to 3:00 pm (cash bar at 11:30; Lunch at 12:00 noon)

\$19.00 per person - Guests Welcome - Entertainment

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Deadline for Reservations: **Monday, December 2**

Menu: Honey Bourbon Salmon - Atlantic Salmon topped with a honey-bourbon glaze **or** Lemon Thyme Chicken - Breast of Chicken sauteed with a light lemon butter sauce (served with salad, Parmesan mashed potatoes, vegetable medley, rolls and butter, Eclair. Beverage station).

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Complete this form and check **ONE** entree per person

Name: _____

Honey Bourbon Salmon _____ Lemon Thyme Chicken _____

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Name: _____

Honey Bourbon Salmon _____ Lemon Thyme Chicken _____

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Name: _____

Honey Bourbon Salmon _____ Lemon Thyme Chicken _____

Amount enclosed _____ Check Number _____

Cut this form out and -----

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Return before **Monday, December 2** with check payable to "Mary Washington ElderStudy" for \$19.00 per person to:

**Rose Marie Schlemm
428 Ingleside Drive
Fredericksburg, VA 22405**

ELDERSTUDY RELATED COMMUNITY INFORMATION

For the convenience and protection of its members, ElderStudy has a policy that the membership list, newsletter and e-mail list be used for only the conduct of official business.

We occasionally get requests from outside organizations asking that we publicize events they are sponsoring. Examples are UMW professors holding special functions open to the public or National Park Service special one-time tours and events. *These events must have a strong educational component.* In addition, many members wish to be notified of the occasional passing of one of their fellow colleagues or UMW faculty.

To accommodate these special cases, a separate e-mail list is maintained. You must request that you be added to the list by e-mailing Stew Engel . You may request removal at any time.