



PRESIDENT'S MESSAGE

On behalf of your officers, Board members, and committee chairs, I wish you a happy new year of learning in ElderStudy. Special thanks to departing Board members Mary Ann Stana and Larry Turner and membership committee chair, Suzanne Willis. Welcome to new officers: President Chuck Watkins, Vice President Barbara Barrett, Treasurer and Administration Committee Chair John Thompson, and Secretary Randy Fennemore; and to new Board members Peggy Gratz, Donna Lewis, and Mel Wright; and to Membership Committee Chair Patricia Parkinson.

As an outreach program of the University of Mary Washington, ElderStudy is an all-volunteer organization of retirement-age people designed to provide about forty 2-hour sessions on a wide variety of subjects presented by experts.

Please remember that your active participation is the cornerstone to our success. Make this your year to serve on a committee or help with an event. At the same time you'll be contributing to the overall mission of supporting the University of Mary Washington and the local community.

As you can see, the enclosed fall schedule is full of interesting topics and we thank the Curriculum Committee, chaired by Bill Wemmerus.

Best wishes for educational adventures this fall!

Bill Toomey

ADMINISTRATION COMMITTEE REPORT

The Administration Committee, with Board of Directors approval, develops policies and plans for operating the ElderStudy organization, monitors finances and projects future needs, proposes an annual budget, recommends annual fees, and periodically reviews ElderStudy governing documents. Quarterly Committee Meetings are held 7 to 10 days in advance of the Board of Directors Meetings.

At its May 27, 2014 Meeting, the Committee reviewed the Treasurer's Preliminary Third Quarter financial reports and approved them, with necessary updates, for presentation to the Board of Directors on June 4th.

Under Old Business, the Committee had lengthy discussions of proposed revisions to the Policy & Procedures Document; these suggested revisions had been received from numerous sources as a result of a "data call" issued in March. The discussions were subdivided into (a) proposed revisions other than Section A, and (b) proposed revisions to Section A: Governing Documents. Many of the revisions related to the relocation of the ElderStudy classroom from Chandler Hall to the Stafford Campus. Committee recommendations were approved for presentation to the Board of Directors at its June 4th Meeting; a Section A recommendation was made to initiate discussions with the University relative to updating the Memorandum Of Understanding.

Under New Business, the Committee discussed budget options for 2014-2015 including membership fee options. A recommendation was approved for presentation at the Board of Directors Meeting on June 4. Also discussed was the availability of excess funds in the 2013-2014 budget which could be used for Grants To Departments in recognition of the classroom programs presented; the Committee approved a recommendation to the Board. The Committee also discussed individuals who might serve as 2014-2015 Committee Chair; the Committee recommended the nomination of John Thompson be presented to the Board.

The next Committee Meeting is scheduled for Tuesday, August 26 at 1 PM in the Center for Lifetime Learning classroom.

[Submitted by: John Thompson, 371-4827 or email: johnsafet@cox.net]

TREASURER'S REPORT

The 2013-2014 Third Quarter (September 1 thru May 31) Operations Report and Balance Sheet Report were approved by the Board of Directors at their June 4th meeting. Copies of these Reports are included with this newsletter and are posted on the ElderStudy website [<http://www.elderstudy.com>]. Costs and expenses for the year-to-date are within budget. Year-end Reports (September 1, 2013 to August 31, 2014) will be presented for approval at the Board Meeting scheduled for September 3rd.

[Submitted by: John Thompson, Treasurer]

2014-2015 ELDERSTUDY BUDGET

The ElderStudy Operating Budget for 2014-2015 (September 1, 2014 to August 31, 2015) was approved by the Board of Directors at its June 4th Meeting and is included in this newsletter. An electronic copy is also available on the ElderStudy website [<http://www.elderstudy.com>].

ANNUAL AUDIT VOLUNTEER

When the Year-End Financial Reports are completed and approved by the Board of Directors at its September 3, 2014 meeting, the ElderStudy Governing Documents require that an independent audit of the 2013-2014 Financial Records be conducted and reported prior to the December Board of Directors Meeting (December 3rd). The Treasurer will make all of the 2013-2014 financial records available by September 17th; the Audit Report must be completed by November 20th and submitted to the ElderStudy President (Chuck Watkins) with a copy to the Administration Committee Chairperson (John Thompson) about 10 days prior to the December 3rd Board Meeting. This Audit has traditionally been performed by an ElderStudy Member; report submittal may be hard copy or electronic.

IF you would be interested in volunteering to conduct this Annual Audit, please contact Barbara Barrett (next year's Vice President; barrettorr@verizon.net) and/or John Thompson (Treasurer; 371-4827 or johnsafet@cox.net) before the September 3rd Board Meeting. Board approval of the Auditor occurs at this meeting.

| | | |
|---|--|---------------------------|
| MARY WASHINGTON ELDERSTUDY | | |
| 2013-2014 Quarterly Balance Sheet Report #3 | | |
| Reporting Period: September 1, 2013 thru May 31, 2014 | | |
| Date of Report: June 2, 2014 | | Approved by BOD: 6/4/2014 |

| Description of Asset or Liability | | As of 9/1/2013 (a) | As of 5/31/2014 (b) |
|---|--|-----------------------|------------------------|
| Assets | Operating Account | | |
| | Wells Fargo Bank Checking Account [Quicken] | \$22,683.79 | \$19,376.70 |
| | Capital Reserve Account | | |
| | Wells Fargo CD 16084 [0.15%; m 10/27/2014] | \$5,135.78 | \$5,159.42 |
| | Wells Fargo CD 16101 [0.10%; m 2/27/2015] | \$5,150.80 | \$5,000.06 |
| | Wells Fargo CD 70719 [0.75%; m 6/28/2015] | \$5,165.52 | \$5,194.57 |
| Total Assets | | \$38,135.89 | \$34,730.75 |
| Liabilities | FY 2012-2013 Expenses Pending | \$50.00 | |
| | FY 2012-2013 Expenses Paid (since Year-End Report) | | \$50.00 |
| | FY 2013-2014 Approved Budget | \$12,250.00 | |
| | FY 2013-2014 Budgeted Expenses Pending | | \$3,369.76 |
| | FY 2013-2014 Capital Reserve (\$15,000 min.) | \$15,452.10 | \$15,354.05 |
| | FY 2013-2014 Grants | TBD | TBD |
| | FY 2013-2014 Classroom Contingency | \$5,000.00 | \$4,958.93 |
| | FY 2013-2014 Membership Renewal Incentive Plan | \$2,220.00 | |
| | FY 2013-2014 Membership Renewal Incentive | | \$2,390.00 |
| Total Liabilities | | \$34,972.10 | \$26,122.74 |
| Assets less Liabilities (Net) | | \$3,163.79 | \$8,608.01 |
| Treasurer's Notes: | | | |
| (a) 9/1/2013 Checking Account is actual per Quicken; CD Information is from Wells Fargo COB 8/31/13. | | | |
| (b) 5/31/14 Checking Account information is per Quicken; CD information is from Bank Statement for the period ending 5/30/14. | | | |
| Respectfully Submitted, John Thompson, Treasurer | | | |

| Mary Washington ElderStudy | | | | |
|--|---|---|------------------|--|
| 2013-2014 Year-to-Date Operations Report #9 | | | | |
| BOD Approved: 6/4/2014 | | | | |
| Accounting Category/Subcategory | 2013-2014 Approved Budget (6/5/2013) | Actuals YTD: 9/1/2013 to 5/31/2014 | % of Plan | |
| INCOME | | | | |
| Carry-over from Prior Year | TBD | \$8,714.33 | | |
| Membership Fees [238 paid] | \$12,095.00 | \$13,152.50 | 108.7% | |
| Interest from Checking Account | \$0.00 | \$0.00 | | |
| Interest from Certificates of Deposit | \$320.00 | \$328.51 | | |
| Miscellaneous (excludes replacement NameTags) | \$0.00 | \$0.00 | | |
| | | | | |
| Total ES Income/Revenue | \$12,415.00 | \$22,195.34 | | |
| EXPENSES | | | | |
| <u>Board of Directors</u> | | | | |
| Awards | \$0.00 | \$0.00 | | |
| BLS Scholarships | \$1,000.00 | \$1,000.00 | 100.0% | |
| Grants (from excess 2013-14 Funds) | TBD | \$0.00 | | |
| Classroom Contingency (funds in checking) | \$5,000.00 | \$41.07 | | |
| Subtotal BOD | \$6,000.00 | \$1,041.07 | | |
| <u>Curriculum Committee</u> | | | | |
| Speakers/Programs (Sept-Apr 23) | \$6,500.00 | \$5,049.22 | 77.7% | |
| Postage/Mailing/Copying | \$125.00 | \$34.30 | 27.4% | |
| Off-site Location [Net]{Natl Cathedral Tour} | \$0.00 | has + balance | | |
| Gifts/Gratuities | \$25.00 | \$0.00 | 0.0% | |
| Stationery/Supplies | \$100.00 | \$51.93 | 51.9% | |
| Telephone Service [9 mos.] | \$150.00 | \$99.00 | 66.0% | |
| Special Activities (net) | \$0.00 | \$0.00 | | |
| Subtotal Curriculum Committee | \$6,900.00 | \$5,234.45 | 75.9% | |
| <u>Administration Committee/BOD</u> | | | | |
| General Operating Funds | \$150.00 | \$0.00 | 0.0% | |
| Stationery/Supplies/Publications | \$125.00 | \$3.56 | 2.8% | |
| Postage/Mailing/Copying | \$75.00 | \$9.04 | 12.1% | |
| Subtotal Administration Committee | \$350.00 | \$12.60 | 3.6% | |
| <u>Membership Committee</u> | | | | |
| Brochures | \$150.00 | \$42.40 | 28.3% | |
| Stationery/Supplies | \$100.00 | \$54.45 | 54.4% | |
| Gifts/Remembrances | \$200.00 | \$60.65 | 30.3% | |
| Name Tags (net) | \$275.00 | \$264.01 | 96.0% | |
| Newsletter (prep & distrib) [4 of 5] | \$1,800.00 | \$1,078.73 | 59.9% | |
| Postage/Mailing/Copying | \$200.00 | \$105.78 | 52.9% | |
| Web Site {2-yr renewal special} | \$125.00 | \$118.54 | 94.8% | |
| Telephone Services [9 mos.] | \$150.00 | \$99.00 | 66.0% | |
| Membership Meetings/Spec Events (Net) | \$1,000.00 | \$809.63 | 81.0% | |
| Subtotal Membership Committee | \$4,000.00 | \$2,633.19 | 65.8% | |
| | | | | |
| Total Expenses (without Classroom Reserve) | \$12,250.00 | \$8,880.24 | 72.5% | |

| MARY WASHINGTON ELDERSTUDY | |
|--|-----------------|
| APPROVED BUDGET FOR THE FISCAL YEAR ENDING AUGUST | |
| Budget Period: September 1, 2014 to August 31, 2015 | |
| Approved: 6/4/2014 | |
| Projected Income | |
| Previous Years Carry-Over Balance | TBD |
| Membership Fees | 13,118 |
| Interest from Checking Account | 0 |
| Interest from Maturing CDs (3) | 46 |
| Miscellaneous | 0 |
| Total Projected Income | \$13,164 |
| Approved Expenses | |
| <u>Board of Directors</u> | |
| Awards | 0 |
| BLS Scholarship | 1,000 |
| Election Expenses (copying, mailing) | 200 |
| Grants (excess funds) | TBD |
| Classroom Contingency | TBD |
| Subtotal | \$1,200 |
| <u>Curriculum Committee</u> | |
| Speakers/Programs | 6,800 |
| Postage, Mailing, Copying | 125 |
| Off-Site Location Events (Net) | 0 |
| Gifts & Gratuities | 25 |
| Stationery & Supplies | 100 |
| Telephone Services | 150 |
| Special Activities (Net) | 0 |
| Subtotal | \$7,200 |
| <u>Administration Committee</u> | |
| General Operating Funds | 150 |
| Stationery, Supplies, Publications | 125 |
| Postage, Mailing & Copying | 75 |
| Subtotal | \$350 |
| <u>Membership Committee</u> | |
| Brochures | 150 |
| Stationery & Supplies | 100 |
| Gifts & Remembrances | 200 |
| Name Tags (Net) | 275 |
| Newsletters (5) | 1,600 |
| Postage, Mailing & Copying | 200 |
| Website | 0 |
| Telephone Service | 150 |
| Memb Mtgs & Spec Events (Net) | 1,000 |
| Subtotal | \$3,675 |
| Total Approved Expenses | \$12,425 |
| Capital Reserve As CDs (minimum) | \$15,000 |

ElderStudy is “Going Green”

Too much paper? Are you overwhelmed by multiple mailings from the organizations you belong to?

ElderStudy can help. You can choose to get your ElderStudy information (newsletters, announcements, sign-up sheets, rosters and updates) electronically. You can get an e-mail notice, an attachment, or a link to the exact location on the ElderStudy website where the information is located.

Just mark your preference for electronic delivery of information on your registration form.

Simplify your life and help ElderStudy by reducing mailing costs.

One item will still be sent via US Mail: ballots for our annual election will be mailed two weeks before our General Membership Meeting in March.

Of course, some ElderStudy members do not have computers, or may want to continue the US Postal Service mailings for other reasons, and we do not want to inconvenience them in any way. If you fit this category you may continue to get all your information by US Mail. Just check the box for “no electronic copies”.

www.elderstudy.com

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

This Newsletter is prepared by me, Dot Meyers, with the help of many members of ElderStudy. If you have any questions or suggestions for the newsletter, please feel free to let me know. You can leave a message on the phone, 540-654-1769, or call me at 540-760-1533.

MEMBERSHIP COMMITTEE

Welcome everyone to the 2014-2015 Mary Washington ElderStudy Lifelong Learning organization.

The annual End of the Year Potluck on May 14 was a success. We owe a warm THANK YOU to Eugenia Jones and to Rose Marie Schlemm who contracted a place, found entertainment, decorated, tallied reservations: and to everyone who brought tasty food, and provided set-up and cleanup. After nine months of interesting, engaging, and charismatic classes the members and guests feasted with popular melodies of our time by John and Mary Vreeland's Music Ministries of St. George's Church.

Membership owes thanks to the curriculum committee that provides interesting, informative, and dynamic speakers for new members, and the members that rejoin ElderStudy each year. Curriculum arranges and schedules classes, trips, and tours that provide us with a greater comprehension and awareness of our world.

The membership committee encourages new membership with old and new methods. In 2014 we "showed our stuff" at community venues and via Internet; at the "Art of Aging" Fredericksburg Expo Center, and joined social media Facebook page (www.facebook.com/MaryWashingtonElderStudy). Also new this year, specially designed "Guest nametags" are available (on the desk under the bulletin board below new member name tags). Members are asked to verbally introduce their guests at classes. Plus the "Guest nametags" make it easier for others to "meet and greet".

The membership committee consists of Suzanne Allen, Sherrill Bartholomew, Peggy Gratz, Chuck Johnson, Eugenia Jones, Anne McGrath, Dottie Meyers, Alan Zirkle, Chuck Watkins, Rose Marie Schlemm, John Parkinson, Stew Engel, Suzanne Willis, Carol Sulima, and Jack Sulima.

The Membership committee welcomes any ElderStudy member who would like to visit and share ideas at our upcoming committee meeting held in the Lifelong Learning Center Wednesday, August 27, 2014 from 1 - 3 PM. Volunteer "your" time; "you" will be greatly appreciated.

Membership Chair

Patricia Parkinson

COMING TO THE THEATRE THIS FALL

September 25th thru October 5th - **Doubt: A Parable** by John Patrick Shanley. At the St. Nicholas Church School in the Bronx, the Sisters of Charity teach the children under the watchful eye of the omnipresent Sister Aloysius, whose unflinching demeanor keeps everyone on the straight and narrow. When a number of dubious events raise her suspicions, Sister Aloysius wastes no time in cornering Father Flynn, the respected and much-loved parish priest. *Doubt* is John Patrick Shanley's powerful and Pulitzer Prize-winning play that plumbs the depths of a powerful he-said, she-said moment of truth.

"The truth makes for a bad sermon. It tends to be confusing and have no clear conclusion." —Father Flynn

" . . . a lean, potent drama . . . passionate, exquisite, important, and engrossing" —New York Newsday

Tickets go on sale September 17th and will be available during/after class. Box Office 654-1124. Show dates: September 25 – 27 and October 2 – 4 at 8:00 p.m., September 28 and October 5 at 2:00 p.m. For the hearing impaired, listening devices are available for checkout at the Box Office prior to each performance. ElderStudy members are encouraged to bring non-member guests to the class on September 24th.

November 6th thru November 23rd – **Sunday in the Park with George**. Music & Lyrics by Stephen Sondheim. Book by James Lapine. In Stephen Sondheim's dazzling rendering of George Seurat's visionary quest to paint *A Sunday Afternoon on the Island of La Grande Jatte*, life becomes art, art becomes life, and dot-by-dot a luminous masterpiece leaps from canvas to stage. With a mesmerizing book by James Lapine and a Sondheim score that soars off the page with breathtaking intensity, *Sunday in the Park with George* is so much more than it seems as George struggles to create a life of consequence amidst lingering doubt, complicated love, and unwavering ideals. One of the most celebrated musicals of all time and the winner of the Pulitzer Prize for Drama.

"So many possibilities." —George

"... an audacious, haunting and, in its own intensely personal way, touching work."
—The New York Times

Tickets go on sale October 29th and will also be available during/after class. Box Office 654-1124. Show dates: November 6 – 8, 13 – 15 and 20 – 22 at 8:00 p.m. November 9, 16 and 23 at 2:00 p.m. For the hearing impaired, listening devices are available for checkout at the Box Office prior to each performance. ElderStudy members are encouraged to bring non-member guests to the class on November 5th.

Mark your calendar! ElderStudy classes are on Wednesday, September 24th and November 5th. See the fall schedule for details.

Questions: Carole / Bob Hanus

The Book Group meets at the UMW Stafford campus in the Library at 1:00 PM.

September 11 Book Group

American Lion: Andrew Jackson in the White House by Jon Meacham

Presenter: Chuck Watkins

2009 Pulitzer Prize winning study of Andrew Jackson. Chronicles the life and career of a self-made man who went on to become a military hero and seventh president of the United States, critically analyzing Jackson's seminal role during a turbulent era in history, the political crises and personal upheaval that surrounded him, and his legacy for the modern presidency.

October 9 Book Group

Sovereign by C. J. Sansom

Presenter: Chuck Morgan

The third installment of Sansom's acclaimed Matthew Shardlake mystery series. Shardlake and his loyal assistant, Jack Barak, find themselves embroiled in royal intrigue when a plot against King Henry VIII is uncovered in York and a dangerous conspirator they've been charged with transporting to London is connected to the death of a local glazer.

November 13 Book Group

The Drunkard's Walk: How Randomness Rules Our Lives by Leonard

Mlodinow

Presenter: Rose Reif

In a narrative and imaginative approach the author vividly demonstrates how our lives are profoundly informed by chance and randomness and how everything from wine ratings and corporate success to school grades and political polls are less reliable than we believe. By showing the true nature of chance and revealing the psychological illusions that cause us to misjudge the world around us, gives us the tools we need to make more informed decisions. An intriguing and illuminating look at how randomness, chance, and probability affect our daily lives will intrigue, awe, and inspire.

December 4 Book Group (one week early)

Sea Glass by Anita Shreve

Presenter: Donna Lewis

Vivid view of life in the late 20's, the textile strike and the benefits of living by the sea. "Layered with the textures, colors and voices of another time." Shreve is the author of *The Pilot's Wife*.

2014 – 2015 Membership Renewal Form

Mary Washington ElderStudy Registration for

Renewal Membership Fees:

Individual \$60

Postmarked by September 12, 2014:

Couple \$100

Postmarked **AFTER** September 12: Individual \$75 Couple \$125

Retired UMW Faculty: no fee, but spouse pays the individual fee

Make your check payable to : **Mary Washington ElderStudy**

Send Registration Form and check to: **Treasurer, Mary Washington ElderStudy**

University of Mary Washington 1301

College Avenue

Fredericksburg VA 22401-5358

I (we) wish to rejoin Mary Washington ElderStudy for the period September 1, 2014 to August 31, 2015

Membership: Individual Couple Retired UMW Faculty

Name(s) _____

(please print clearly)

Street Address _____

City _____ State _____ Zip _____

Email address _____ Phone _____

Email address _____ Phone _____

Your email addresses and phone numbers will be included in membership rosters available only to members and will be used by ElderStudy for announcements, program cancellations/changes, etc.

Replacement Nametags are available for an additional fee of \$5 per nametag.

If needed, print your name(s) below as you would like it (them) to appear on the nametag(s):

Please deliver ElderStudy information (newsletters, announcements, rosters) as directed below:

____ Send my ElderStudy information electronically to my e-mail address.

____ No electronic mailings. Send my information via US Mail.
