



PRESIDENT'S MESSAGE

There's a Fall chill in the air. As much as I enjoyed summer vacation (if it's possible for a retiree to take vacation), it's also great to have classes back in session. ElderStudy clearly survived the trauma of moving from our beloved Chandler Hall as we now have experienced a second year of significant membership growth. We have a beautiful facility, easy parking, seats galore, and the A/V support has been tweaked and retweaked so we can see and hear clearly. If only VDOT could finish the %& \$# road construction! I've found wonderful alternative scenic routes between Routes 1 and 17, involving Enon Road and Truslow Road—take a look at Google Maps.

Kudos to the Curriculum Committee for the fantastic line-up of lectures and tours. I find myself opting in to more events this year than ever. Also to the Membership Committee who've implemented two major new initiatives. Members who failed to renew got a telephone follow-up before the renewal deadline, just to make sure that it was an intentional decision. They also established a buddy system, pairing a seasoned member with new members to help them assimilate into our group on a personal level. And I dare not forget Admin Committee, our Treasurer, and the editor of this newsletter, who are tireless in keeping things humming.

I'm honored to serve as your President, and ever grateful for all the former Board and Committee leaders who selflessly recycle themselves in service to this organization, ensuring that us newbees don't mess up the good thing we've all got going here.

Best regards,

Chuck Watkins

ADMINISTRATION COMMITTEE REPORT

The Administration Committee, with Board of Directors guidance, develops policies and plans for operating the ElderStudy organization, monitors finances and projects future needs, proposes 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 8 days in advance of the Board of Directors Meetings.

The most recent Committee Meeting was held on August 26 with an abundant attendance. Preliminary year-end financial reports were discussed and approved for presentation to the Board with appropriate updates as necessary for the last five days of August. A recommendation for the conduct of the Annual Audit was developed for presentation to the Board of Directors at the September meeting. Policy and Procedures 2014 was issued to the Board at their Board Meeting on September 3; a lending-copy is available in the Classroom. Activities associated with Policy & Procedures 2015 have been initiated; input from the membership is anticipated.

The next Committee Meeting is scheduled for November 25th at 1 PM in the Center of Lifelong Learning at the UMW Stafford Campus [Room SC210 South]. A recommendation for the annual BLS Scholarship will be discussed and a progress report from the Section A Review Subcommittee is anticipated. Questions and comments may be addressed to John Thompson .

TREASURER'S REPORT

The ElderStudy 2013-2014 Year-End Financial Reports for the period September 1, 2013 thru August 31, 2014 were approved by the Board of Directors on September 3 and are included in this newsletter. Although the annual expenses exceeded the budget, the expenses were less than the annual income from membership fees. Electronic copies of the reports are available on the ElderStudy website [<http://www.elderstudy.com>]. Efforts are in progress to complete the 2013-2014 Annual Audit before Thanksgiving in order to report the audit findings at the Quarterly Board Meeting on December 3rd. If you have questions, please contact the Treasurer (John Thompson).

ADVENTURES IN LIFELONG LEARNING EST 1993 OCTOBER 2014

MARY WASHINGTON ELDERSTUDY

2013-2014 Year-End Balance Sheet Report

Reporting Period: September 1, 2013 thru August 31, 2014

Date of Report: September 1, 2014

BOD Approved 9/3/2014

	Description of Asset or Liability	<u>As of 9/1/2013</u> (a)	<u>As of 8/31/2014</u> (b)
Assets	Operating Account		
	Wells Fargo Bank Checking Account [Quicken]	\$22,683.79	\$22,601.81
	Capital Reserve Account		
	Wells Fargo CD 16084 [0.15%; m 10/27/2014]	\$5,135.78	\$5,161.37
	Wells Fargo CD 16101 [0.10%; m 2/27/2015]	\$5,150.80	\$5,001.32
	Wells Fargo CD 70719 [0.75%; m 6/28/2015]	\$5,165.52	\$5,204.40
	Total Assets	\$38,135.89	\$37,968.90
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 Expenses Pending		\$0.00
	FY 2013-2014 Capital Reserve (\$15,000 min.)	\$15,452.10	\$15,367.09
	FY 2013-2014 Grants	TBD	\$2,200.00
	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
	FY 2014-2015 Approved Budget		\$12,425.00
	Total Liabilities	\$34,972.10	\$37,391.02
Assets less Liabilities (Net)		\$3,163.79	\$577.88

Treasurer's Notes:

(a) 9/1/2013 Checking Account is actual per Quicken; CD Information is from Wells Fargo COB 8/31/13.

(b) 8/31/14 Checking Account information is per Quicken; CD information is from Bank Statement for the period ending 8/29/14.

Respectfully Submitted,
John Thompson, Treasurer

ADVENTURES IN LIFELONG LEARNING EST 1993 OCTOBER 2014

**Mary Washington ElderStudy
2013-2014 Year-End Operations Report**

BOD Approved 9/3/2014

Report Date: 9/1/2014

Accounting Category/Subcategory	2013-2014 Approved Budget (6/5/2013)	Actuals YTD: 9/1/2013 to 8/31/2014	% 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	
Early Membership Fees for 2014-15 [129 paid]	N/A	\$7,270.00	
Total ES Income/Revenue	\$12,415.00	\$29,465.34	
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	\$2,200.00	
Classroom Contingency (funds in carry-over)	TBD	\$41.07	
Subtotal BOD	\$1,000.00	\$3,241.07	
<u>Curriculum Committee</u>			
Speakers/Programs	\$6,500.00	\$6,099.22	93.8%
Postage/Mailing/Copying	\$125.00	\$34.30	27.4%
Off-site Location [Net]{Natl Cathedral Tour}	\$0.00	+ balance	
Gifts/Gratuities	\$25.00	\$0.00	0.0%
Stationery/Supplies	\$100.00	\$51.93	51.9%
Telephone Service [12 mos.]	\$150.00	\$132.00	88.0%
Special Activities (net)	\$0.00	\$0.00	
Subtotal Curriculum Committee	\$6,900.00	\$6,317.45	91.6%
<u>Administration Committee/BOD</u>			
General Operating Funds	\$150.00	\$0.00	0.0%
Stationery/Supplies/Publications	\$125.00	\$137.06	109.6%
Postage/Mailing/Copying	\$75.00	\$85.39	113.9%
Subtotal Administration Committee	\$350.00	\$222.45	63.6%
<u>Membership Committee</u>			
Brochures	\$150.00	\$88.21	58.8%
Stationery/Supplies	\$100.00	\$81.86	81.9%
Gifts/Remembrances	\$200.00	\$60.65	30.3%
Name Tags (net)	\$275.00	\$264.01	96.0%
Newsletter (prep & distrib) [5 of 5]	\$1,800.00	\$1,322.36	73.5%
Postage/Mailing/Copying	\$200.00	\$132.36	66.2%
Web Site {2-yr renewal special}	\$125.00	\$118.54	94.8%
Telephone Services [12 mos.]	\$150.00	\$132.00	88.0%
Membership Meetings/Spec Events (Net)	\$1,000.00	\$809.63	81.0%
Subtotal Membership Committee	\$4,000.00	\$3,009.62	75.2%
Total Expenses (without Classroom Reserve)	\$12,250.00	\$12,749.52	104.1%

MEMBERSHIP COMMITTEE REPORT

Mary Washington ElderStudy welcomes 33 new members and the “Renewal Reminder Callers” were able to remind about 40 prior members to rejoin. This total is now 219 members as of September 18, 2014.

The 2014-2015 year election determined the new officers as follows: President Chuck Watkins; Vice-President Barbara Barrett; Secretary Randy Fennemore; and Treasurer John Thompson.

ElderStudy is a complete volunteer educational organization. Our committees function only by volunteers sharing their talents and developing new ones. It is composed of three committees; administrative, curriculum, and membership. These committees depend on YOU. Without your participation, there are no committees, no curriculum, and no membership. Opportunity positions involve socializing, communicating, making new friends and activities.

Everyone is welcome and invited to attend the Membership Committee and pursue one of these opportunities: Webmaster, Secretary, Answer Phone Inquiry, New Member Buddies, Venue Representatives, and more. Present volunteers help new volunteers learn. And you develop your own style to perform your opportunity and communicate with more members. If you have any questions about any of these positions, call Patricia Parkinson 540-903-3526 or ask someone at the next session.

The Membership Committee (MC) is making plans for the following upcoming events:

General Meeting on Wednesday, October 15, 2014 at 10 AM in LLC Stafford Campus.
ES Membership Committee Meeting November 19, 2014 at 1 PM in LLC

Christmas Social Luncheon on Thursday, December 11 at Lake of the Woods, from 11:30 to 3 PM with entertainment (the reservation forms are located in this newsletter and on the LLC bulletin board table.)

If you have any questions, feel free to contact us using the ES Roster or the following options:

- Call 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
- Leave a message in the contact box online and we will reply.
- See us “in person” at a session to chat!

Membership Chair, Patricia Parkinson

CURRICULUM COMMITTEE REPORT

I want to thank all members of the curriculum committee for their efforts in putting together our programs. Finding and lining up speakers and then making the necessary logistical arrangements as sponsor is not always the easiest job in the world, and they are to be commended for their efforts. We've already had quite a few interesting programs this fall, and are hard at work preparing for this spring.

In the event that a scheduled program must be cancelled, we will make every effort to schedule a backup program of equal interest. For example, our October 30 speaker was forced to cancel, and he has been replaced by John Hennessey of the Park Service who has given us interesting programs in the past.

I would also like to extend an invitation to any member who wants to see how our committee operates to join us at 1PM on October 16. You will find it interesting, and you will be under no obligation to sponsor a program (unless you want to!)."

Bill Wemmerus, Committee Chair

GOVERNING DOCUMENTS

There are two documents, which form the basis for the ElderStudy program at the University of Mary Washington. The first document is the Memorandum of Understanding with the University that defines the responsibilities and commitments of both parties. The second is the Constitution and Bylaws, which defines the purpose of Mary Washington ElderStudy as an outreach program of the University of Mary Washington and provides the organization and structure to facilitate learning through joint study and interaction among interested elder members of the community.

Try Your Hand As Our Webmaster . . .

Chuck Watkins has served as the ElderStudyWebmaster for several years. Our website is outstanding – well organized, good looking, and user friendly.

Chuck has now become our President, and it's time to find someone else to assume webmaster duties. It's a great way for some ElderStudy member to do their part to support the organization. If you have any experience along these lines, or if you just want to expand your computer expertise, please consider volunteering for this position.

The plusses:

- 1) the website is established and running well, (and as Webmaster you would be volunteering without having to attend a lot of meetings.)
- 2) Everything is menu driven, and you'll have plenty of help and instruction from the get-go should you need it.

The minuses: none.

Please contact either Chuck Watkins or Anne McGrath for more information.

Anne McGrath

www:ElderStudy.com What you need to know, when you need to know it.

The “Green Book”

Policies and Procedures 2014, has been approved and published. Two copies are in our classroom, one for reference and the other for checkout. Of course it is online at our Website: www.ElderStudy.com. Click on the Governance tab and scroll down to “Policies and Procedures”.

The 2014 edition is in a bright green cover, easily distinguished from its predecessor, the “blue” book.

GENERAL MEMBERSHIP MEETING

The General Membership meeting will be held on October 15, 2014 at 10 to 12AM in LLC Stafford Campus. This is for all members. Come and get acquainted with some new members and some experienced ones also. Refreshments will be served and the meeting is usually very brief. Lots of good togetherness!

HOLIDAY LUNCHEON DECEMBER 11, 2014

Get your reservation in by **December 2!** They are available on the website, on the table by the bulletin board in the LLC room, and in the newsletter if you get a paper copy.

VOLUNTEER

ElderStudy is an all volunteer organization and relies on its members to carry out the business of planning the programs for all to enjoy and keeping the members informed of the events. In order for this to happen, volunteers are needed. Any help that you can offer, be it only a small part, will go a long way to keep the organization functioning smoothly. As the saying goes, “Many hands make the work easier”.

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.

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.

**JOIN US FOR THE ANNUAL
ELDERSTUDY HOLIDAY LUNCHEON**

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

Thursday, December 11, 2014

11:30 AM to 3:00 PM (Cash bar at 11:30; Lunch at 12:00 noon)

\$20.14 per person

Guests Welcome

Entertainment

Deadline for Reservations: **Tuesday, December 2, 2014**

Menu: Stuffed Flounder - Flounder filet stuffed and topped with lemon-sherry sauce or **Chicken Piccata** - Sauteed chicken breast topped with garlic, mushroom and a lemon caper sauce. Served with salad and a choice of French or Italian dressing, vegetable medley, Red Bliss potatoes, and Carrot Cake. Beverage station.

Complete this form and check ONE entree per person

Name: _____

Stuffed Flounder _____ Chicken Piccata _____

Name: _____

Stuffed Flounder _____ Chicken Piccata _____

Name: _____

Stuffed Flounder _____ Chicken Piccata _____

Name: _____

Stuffed Flounder _____ Chicken Piccata _____

Amount enclosed _____ Check number _____

Return before Tuesday, **December 2, 2014**, with check made payable to **Mary Washington Elder Study**, for \$20.14 per person to:

Carolyn Sulima
12603 Cannon Crest Dr.
Fredericksburg, Va. 22407