



## **Musings of the President**

The second semester programs are off to a great start with many exciting subjects, thoughtful reviews of books, and informative and entertaining tours. Thanks to the members who are sponsoring and presenting these programs.

We will have new and dedicated leadership on the next Board of Directors (see the bios in this news letter). Remember ElderStudy is a volunteer-run organization. **Get involved on one of the committees!!!**

Stay active in our program, keep active physically, and develop new social relations with our members.

Fondly,

Charles (Chuck) R. Block, MD

**The ElderStudy Spring Potluck luncheon date has been changed. The luncheon will be held on Thursday, May 23, at the Spotswood Baptist Church, beginning at 11:30 am. Details will follow in the next newsletter.**

## NEWS FROM THE ADMINISTRATION COMMITTEE

Welcome to 2019, the snow, and the great Spring Program Schedule. The Administration Committee is one of the three standing committees of the ElderStudy organization. Administration is responsible for (a) developing policies and plans for operating the ElderStudy organization subject to approval by the Board of Directors, (b) for monitoring finances and projecting future needs including the preparation of an annual budget, and (c) for updating the content of the Policy & Procedures Document when necessary or appropriate. The Admin Committee meets quarterly about one week in advance of the Board of Directors Meetings; meetings are open to the general membership.

**The next meeting** of the Administration Committee is scheduled for Wednesday, February 27 at 1 PM in the ElderStudy Classroom. Key elements of this meeting will be **(a)** review of preliminary mid-year financial information/reports as provided by the Treasurer, **(b)** a “kick-off” of the 2019-2020 Budget Planning Process which will be completed at the May Committee meeting with the compilation of a preliminary budget (including recommended membership fees for the 2019-2020 Year) for subsequent presentation to the Board of Directors, and **(c)** a status report regarding Committee Chair Planning associated with activities to identify a candidate to replace the current chair in mid-June. It should be noted that the Board of Directors must approve both the recommended budget and the chairperson nominee at its June Quarterly Meeting.

For additional information regarding Administration Committee Operations and Activities, please contact John Thompson (johnsafet@cox.net or 540-371-4827).

## CURRICULUM COMMITTEE

We are well into our spring 2019 program schedule. Our top five topics are: history and politics with 10 programs followed by tours, galleries & museums with 7, medicine & healthcare with 6, literature & the arts with 6 and UMW, Fredericksburg & Virginia with 5. In fall 2018 we had three programs with 100+ attendance: 128 for Rich Martin's program *The First Amendment, a Free Press and Fake News – Why Facts Matter*; 112 for Stephen Farnsworth's program *Election Analysis*; and 111 for John Hennessy's program *Exodus, Slavery, War and the Struggle for Freedom in the Fredericksburg Region*.

We are starting to plan for fall 2019. Our dedicated sponsors have developed 39 program ideas so far and 24 of these have dates and speakers. We always welcome new program ideas that may be of interest to our members. If you see an article in the newspaper or on TV or the internet about a special person in the area, I would encourage you to contact the person and see if they would be willing to come and talk to us about his or her experiences. Thanks to Charlie Fennemore for the attached update to the sponsor responsibilities.

Just a reminder that it is strongly recommended that prior to heading out for a session regardless of where it is being held, all ElderStudy members should check to ensure there has not been a last-minute cancellation. Occasionally such factors as weather, family emergencies, etc., will force us to cancel a session. Every effort will be made to get this information out to the membership via the web site or an email alert.

Respectfully submitted,

Joe Alfred  
Chair, Curriculum Committee

## MEMBERSHIP COMMITTEE REPORT

ElderStudy ended the first semester with our annual holiday luncheon. For the first time, this event was held on the Stafford Campus of UMW in University Hall. It proved to be a great venue, with a delicious meal, soothing entertainment provided by Harpist Elizabeth Ciresi and a wonderful opportunity to connect with other members. Many thanks to Eugenia Jones and Carolyn Sulima for organizing this special event! We will likely return to University Hall for future holiday celebrations.

Our membership continues to grow, now exceeding the 375 mark! Thanks for helping to spread the word about our vibrant organization!

Wednesday, March 20, we will hold our Spring General Membership meeting. We encourage you to join us for a social time with coffee and light refreshments beginning at 9:30 am. Our one hour session will begin at 10 am, when Jim Mooney will return by popular demand to ElderStudy to discuss his second tour of duty as a helicopter pilot in Viet Nam as the war was winding down. Following a brief break at 11, we will hold our General Membership meeting. This meeting provides a great opportunity to learn more about the status of our organization, the activities of the committees and the most current issues facing ElderStudy. Please plan to attend!

Please note that we have had to **change the date of our Spring End-of-Year Potluck Luncheon** from the date that is advertised in the spring schedule. The luncheon will be held on Thursday, May 23, from 11:30-2, at the Spotswood Baptist Church. More information will be provided in our April newsletter.

Members are reminded to keep their roster information up to date and submit all changes to [membership@elderstudy.info](mailto:membership@elderstudy.info). New members are encouraged to pick up their permanent nametags in the classroom when you attending a session. We also ask your help in identifying members who have been infirmed or suffered a loss in their family so we may reach out to them. Contact Susanne Lazanov with this information at [suelaz@aol.com](mailto:suelaz@aol.com).

If you are looking for a way to get more involved in ElderStudy, please consider joining us at our next Membership Committee meeting February 28, from 10-12 in the CLL.

Donna Lewis, Membership Committee Chairperson

## **ElderStudy Financial Report**

The ElderStudy Operations Report for the first three months of the 2018-2019 Year (September thru November) is enclosed with this newsletter. Membership fees for the reporting period are sufficient to cover all of the budgeted expenses. As of January 15, the number of paying members has increased to 384, compared with 301 at this time last year. A mid-year financial report will be presented to the Board of Directors for approval at its March 6 Quarterly Meeting. Questions and comments regarding the Financial Report may be addressed to Bryn Pavek as the ElderStudy Treasurer.

### **Volunteer Opportunity,**

8 hours total: Are you looking for an easy, short term way to help ElderStudy? If so, I am looking for 1-2 volunteers available once a week in August, who can help me to process membership forms and fees for ElderStudy. If you can write clearly and record details—then you are the person I am looking for! We would typically get together on a Friday, Saturday or Monday (we can agree ahead of time on days) for the four weeks in August, and take 2 hours each week.

Contact: [brynpavek@aol.com](mailto:brynpavek@aol.com) or 703-716-0888.

**THANK YOU FOR VOLUNTEERING.**

**THIS IS A VERY IMPORTANT JOB .**

**YOU WILL BE DOING A GREAT SERVICE TO  
ELDERSTUDY .**

**A LOT OF WHEELS MAKE THE TRAIN GO  
STEADY AND YOU ARE ONE OF THE BIG  
WHEELS!**

**FOR OFFICIAL USE ONLY**

**MARY WASHINGTON ELDERSTUDY**  
**2018-2019 Quarterly Balance Sheet Report #1**

Reporting Period: September 1, 2018 thru November 30, 2018  
 Date of Report: December 5, 2018

**BOD Approved: Yes**

	<b>Description of Asset or Liability</b>	<b><u>As of 9/1/2018</u></b>	<b><u>11/30/2018</u></b>
		<b>(a)</b>	<b>(b)</b>
<b>Assets</b>	<b>Operating Account</b>		
	Wells Fargo Bank Checking Account [Quicken]	\$44,222.48	\$44,666.07
	<b>Capital Reserve Account</b>		
	Wells Fargo CD 58022 [0.30%; m 10/27/2021]	\$5,213.19	\$5,217.13
	Wells Fargo CD 82954 [0.10%; m 1/3/2019]	\$5,042.66	\$5,046.47
	Wells Fargo CD 82913 [0.30%; m 9/29/2021]	\$5,283.37	\$5,298.81
	<b>Total Assets</b>	<b>\$59,761.70</b>	<b>\$60,228.48</b>
<b>Liabilities</b>	FY 2017-2018 Budget Expenses Pending	\$0.00	\$0.00
	FY 2018-2019 Approved Budget /Current Balance	\$18,020.00	\$13,320.59
	FY 2018-2019 Capital Reserve ( \$15,000 min.)	\$15,539.22	\$15,562.41
	FY 2018-2019 Grants (typically \$2000-2500)	TBD	TBD
	FY 2018-2019 Classroom Contingency	\$4,391.37	\$4,391.37
	<b>Total Liabilities</b>	<b>\$37,950.59</b>	<b>\$33,274.37</b>
	<b>Assets less Liabilities (Net)</b>	<b>\$21,811.11</b>	<b>\$26,954.11</b>

**Treasurer's Notes:**

(a) 9/1/2018 Checking Account is actual per Quicken; CD Information is from Wells Fargo COB 8/31/18.

Classroom Contingency is as of 8/31/2018. Total Liabilities projected at \$40,450.59 with grants; Net projected \$19,311.11

(b) Checking Account information is per Quicken as of 11/30/2018; CD information is from 11/30/18 Bank Statements.

Total Liabilities projected at \$35,774.37 with grants; Net projected \$24,454.11.

Respectfully Submitted,  
 Bryn Pavek, Treasurer

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**Mary Washington ElderStudy  
2018-2019 Operations Report #4**

12/31/2018

Accounting Category/Subcategory	2018-2019 Approved Budget (6/6/2018)	9/1/2018 thru 12/31/2018	% of Plan
<b>INCOME</b>			
Membership Fees	\$19,200.00	\$23,468.00	122.2% (a)
NameTag Replacement Fees	tbd	\$6.00	
Interest from Certificates of Deposit	tbd	\$12.19	
Miscellaneous (excludes replacement NameTags)	tbd	\$256.00	(f)
Membership Special Events Fees	\$3,000.00	\$2,376.00	(g)
Curriculum Off-Site Fees	tbd	\$1,431.00	LOC
<b>Total ES Income/Revenue</b>	<b>\$22,200.00</b>	<b>\$27,549.19</b>	
<b>EXPENSES</b>			
<b>Board of Directors</b>			
BLS Scholarships	\$1,500.00	\$1,700.00	113.3% (n)
Election Expenses (copying, printing)	\$250.00	\$0.00	
Grants (from excess 2017-2018 Funds)	tbd	\$0.00	
Classroom Contingency	\$0.00	\$0.00	
<b>Subtotal Board Of Directors</b>	<b>\$1,750.00</b>	<b>\$1,700.00</b>	
<b>Curriculum Committee</b>			
Speakers/Programs (Aug-Nov)	\$7,500.00	\$2,950.00	39.3%
Postage/Mailing/Copying	\$125.00	\$32.00	25.6%
Off-site Location Programs	tbd	\$1,165.00	(b)
Gifts/Gratuities	\$25.00	\$0.00	0.0%
Stationery/Supplies	\$150.00	\$0.00	0.0%
Special Activities	tbd	\$0.00	
<b>Subtotal Curriculum Committee</b>	<b>\$7,800.00</b>	<b>\$4,147.00</b>	
<b>Administration Committee/BOD</b>			
General Operating Funds	\$250.00	\$0.00	
Stationery/Supplies/Publications	\$650.00	\$172.66	
Postage/Mailing/Copying	\$200.00	\$77.35	
<b>Subtotal Administration Committee</b>	<b>\$1,100.00</b>	<b>\$250.01</b>	
<b>Membership Committee</b>			
Brochures/Rack Cards	\$100.00	\$0.00	0.0%
Stationery/Supplies	\$200.00	\$0.00	0.0%
Gifts/Remembrances	\$200.00	\$17.00	8.5%
Name Tags	\$350.00	\$298.40	48.4%
Newsletter/Communications (2,5)	\$800.00	\$214.94	26.9%
Postage/Mailing/Copying	\$270.00	\$181.64	67.3%
Web Site (renewed Feb 2018 for 2 yrs)	\$150.00	\$0.00	0.0%
Telephone Services (3 mo)	\$300.00	\$66.00	22.0%
Membership Meetings/Spec Events	\$5,000.00	\$382.50	7.7%
<b>Subtotal Membership Committee</b>	<b>\$7,370.00</b>	<b>\$1,160.48</b>	
<b>Total ES 2018-2019 Expenses YTD</b>	<b>\$18,020.00</b>	<b>\$7,257.49</b>	

- a. Member Fees=\$17,322 Early Fees + 2,433in One Plus Fees in 18-19 from 17-18 and \$3633 net Memb renewals & new after Sept 1, 2018.
- b. \$200 Bus Deposit paid in 17-18; total \$1,365. Expense offset by fee reservations.
- f. \$150 Belmont refund; 3 Donations scholarship
- g. Winter Holiday Lunch fees Catering was \$2,131
- n. Includes \$200 donations to fund

### **Board of Directors Election**

At the March 20, 2019 General Membership Meeting, the membership will be electing three individuals to serve on the Board of Directors for three-year terms beginning September 1, 2019 and ending August 31, 2022. Information about the election is provided by the ElderStudy Secretary and is included in this newsletter. Ballots will be mailed to each member by the end of February. Ballots may be returned either in person at the General Membership Meeting or by US Postal Service. Ballots may not be submitted by email. All ballots must be received by 10:00 AM on March 20, 2019. Blank ballots will NOT be available at the meeting. Following are the biographies of the three candidates.

#### **Leila Davis**



Leila Davis is originally from Miami, Florida, and attended Barry University in that city, and then graduate school at the University of Georgia for an M.A. in Journalism. From grad school, she moved to New York City where she worked as a business journalist for 10 years. NYC is also where she met her husband of 39 years, Robert Trigaux. After another year working in London, Leila and Robert settled in Alexandria, Va., where Leila worked for tech business publications and Robert covered banking. Their son was born at Georgetown Hospital. In 1991, they moved to St. Petersburg, FL, where Leila worked first as a journalist and then attained her teaching certification at the University of South Florida.

Leila spent the last ten years of her career as a high school English and Debate teacher and Debate coach, retiring three years ago. As a Debate coach, Leila's high school team traveled nationally and won numerous awards, including the National High School Ethics Bowl championship. After retiring from high school teaching, she became an adjunct professor of Philosophy at the University of South Florida and coached the college Ethics Bowl team there.

In January of last year, after a long search for the perfect town within train distance of D.C., Leila and Robert moved from St. Petersburg to Fredericksburg, Va., to be closer to their son, who now lives in the District. Leila immediately signed them up for ElderStudy to continue their lifelong pursuit of learning and to meet some of the wonderful ElderStudy community. Since last May, Leila has served on the Membership Committee, copying, collating and sending out all the welcome packages to new members of ElderStudy.



### **Ron Gates**



I was born and raised in New Jersey. After completing college and serving four years in the United States Air Force I married my wife Patricia and worked in the wholesale food service distribution business for 40 years plus.

We moved to Spotsylvania in 2013 after retiring to be near our daughter, son-in-law and grandsons who live in Fredericksburg. Other considerations were living near a university with its cultural activities. Good medical facilities were also important in helping us make our decision to relocate here.

### **Susanne Lazanov**



I moved to the Fredericksburg area with my husband, Rich, in 2004 after having lived in Reston for 22 years. In 2017, I retired from the pet care service I founded and managed for 11 years. Previously I had careers as an elementary school teacher, franchise owner and freelance writer/editor. As a volunteer, I tutored life skills at the Fairfax County Adult Detention Center and adult literacy for the Northern Virginia Literacy Council. Within the Falls Run community where I live, I chaired the Gazette Committee, as well as two ad hoc committees, and served on the Communications Committee. Currently I chair the Falls Run Community Association Election Committee and serve on the Covenants Committee. I joined ElderStudy in 2015. As an advocate for and practitioner of lifelong learning, I look forward to collaborating with other ElderStudy board members in enhancing the value of our organization to the members.

### SESSION SPONSORS

Each session must have a sponsor as well as a presenter. The sponsor is an ElderStudy member who volunteers to coordinate the session. Usually, but not always, the sponsor is the member who proposed the session. The duties of a sponsor include:

- Negotiating a date and time for the presentation with the presenter and the Curriculum Committee's Session Scheduler
- Obtaining a satisfactory session title and description from the presenter
- For tours: determining any attendance limits or other details; designating (or being) the point of contact for reservations if necessary; providing complete and understandable directions to the site
- Obtaining the presenter's phone number(s), email address, mailing address, honorarium or donation information, and whether the presenter will be using the internet when presenting at the CLL
- Managing the exchange of information with the presenter
- Reminding the presenter a week or two before the date of his/her session
- Greeting the presenter, aiding in setting up any required audiovisual or other equipment, and noting the ten-minute mid-program break
- Handling room overflows when necessary • I
- Opening the session with announcements and information on upcoming sessions, then . . . • I., introducing the presenter, using biographical data provided by the presenter
- Welcome new members
- Counting attendance at the session and reporting this to the Curriculum Committee
- Thanking the presenter and providing a certificate of appreciation, if available.

### SESSION SCHEDULING

ElderStudy sessions are scheduled on Tuesdays, Wednesdays, and Thursdays. Organizational meetings may sometimes be scheduled on Mondays and Fridays, at the choosing of the committee chairs or the Board of Directors. Sessions normally extend from 10am to noon or from 1pm to 3pm. Other daytime hours may be used if necessary (for example, a bird walk starting at 8am). Sessions should not be scheduled on Monday, Friday, or at night because of members' scheduling conflicts or members' desire not to drive at night. Exceptions may be made only with committee consensus and, perhaps, advice from the Board of Directors.

Care must be taken not to schedule sessions on holidays or other special days which might cause problems with member participation.

The fall semester sessions usually begin in September. Sessions in late August may be held if that is the only time that the presenter is available. Similarly, spring semester sessions usually end in May, but sessions in early June may be scheduled if necessary.

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

