

A HISTORY OF LEARNING IN RETIREMENT, INC.

Richard J. Anderson

Carol J. Fisher, Ed.

OFFICERS & BOARD

Officers 1994-1996

Richard Forbecker, Pres.
Robert Schieman, V. Pres.
Ann Jewett, Sec.
Richard Morgan, Treas.

Board Members (94-96)

Mary Lou Dixon
John H. Green
Elsie S. Harper
Paul W. Izant
Edie Klein
Virginia Macagnoni
Lee Meinersmann
Frank Walton

Officers 1996-1997

Robert Schieman, Pres
Ann Jewett, V. Pres.
George Osterkamp, Sec.
Richard Morgan, Treas.

Board Members (96-98)

Betty Bailey
Charles Thompson
Jefferson Sharp
Frank Walton (95-97)
Elsie Harper (95-97)
Virginia Macagnoni (95-97)

Early in 1994 a small group of community leaders interested in expanding services for older citizens met with Dr. Judith Dejoy, Head of Community Programs at the Georgia Center for Continuing Education, and planned the organization that would become Learning in Retirement. The first classes were offered in the fall of 1994, with somewhat over 100 charter members. In addition to Dr. Dejoy, Carolyn Hatfield, the Learning in Retirement Staff Coordinator, and Senior Secretary Cheryl Anderson helped implement the program using the model recommended by Elderhostel, Incorporated. Richard Forbecker, who chaired the organizing committee, was elected the first president.

The guiding principles of the organization followed those identified by Elderhostel, Inc. through the Elderhostel Institute Network. (open to all retirees, self-governing, financially independent, provide non-credit college level classroom and experiential learning experiences). These four criteria have remained the goals throughout the years of operation. The four officers (president, vice president, secretary, and treasurer) are elected for a one-year term beginning July 1. Five board members are elected each year for a two-year term; often the Board Members chair committees, although some do not. LIR, the shorthand name soon adopted, was a member of the Elderhostel Institute Network until this network was disbanded by Elderhostel in 2002.

Mr. Forbecker passed away during his term of office, and Robert Schieman became the second president during the formative years. Classes were held at the Georgia Center for Continuing Education for which LIR paid \$50 per room for each time used. Portions of the salaries of the three Center staff members were also charged to the LIR budget as well as printing and copying costs. Dues were approximately \$55 per person and classes cost \$5 per session. Members received free parking for classes in the Center garage.

In 1996 a small but ambitious group of retirees in Washington, Georgia had begun meeting to plan a similar organization under the leadership of Joe and Dot Harris. They began meeting with the Georgia Center Staff and Learning in Retirement members, and it was mutually agreed that the Washington group would become a "Chapter" of Learning in Retirement at the Georgia Center for Continuing Education. The Washington chapter has its own program, dues, newsletter, and

Officers 1997-1998

Ann Jewett, Pres.
Frank Walton, Vice Pres.
George Osterkamp, Sec.
Richard Morgan, Treas.

Board Members (97-99)

Bernadette Allard
Paul Izant
Mary Lou Zeitler
Mary Lou Dixon
Jim Jacobson

Officers 1998-1999

Betty Bailey, Pres.
Jim Jacobson, V. Pres.
Corwin Mokler, Sec.
Helen Taylor, Treas.

Board Members (98-2000)

Walter Brown
Doris Firth
Carol Fisher
Robert Jordan
Larry Hymo
Don Lang
Frances Lang
Connie Lavelle

elects its own committees. Ann Jewett, president from 1997-1998, signed the "Chapter Membership Status Agreement" with the Washington Group representatives in January 1998, and by May, 1998 they held their first classes. That year both the Athens and Washington members shared a tour of the Washington, Georgia Christmas Tour of Homes.

President Jewett organized a membership planning meeting that was well attended and further refined the direction LIR whether to have a community service component to directions would take in the following years. This meeting dealt with everything from curriculum and travel/study.

A small committee that year worked on the Mission Statement in the appendix: *The mission of Learning in Retirement at the University of Georgia Center for Continuing Education is to bring our philosophy into alignment with our goals. The Philosophy Statement is as follows: Learning in Retirement is an organization of active, retirement-age persons interested in pursuing lifelong learning. It is organized as a learning cooperative. LIR seeks to create diverse opportunities for intellectual engagement, self-expression, and social interaction. Members have varied backgrounds, experiences, and interests that contribute to the development of these opportunities. Members, released from full-time employment, are free for self-directed, member-driven learning and expansion of personal horizons.*

They also developed Instructional Models for Curriculum that designated the models: Lecture-Discussion, Study Group, Roundtable, and Panel Series. Each model had the type of leadership that accompanied it and the role of the participants. See full models in appendix.

Under the leadership of both Ann Jewett and Betty Bailey, our fourth president, Learning in Retirement began to expand the programming and become a more stable organization. Membership was now between 150 and 200 members.

President Bailey appointed a committee to explore alternative or additional sponsors for our organization. Also at this time a supplemental mailing was developed for social activities and travel/study not part of a course at the request of the Community Programs Office. This flyer was budgeted and produced independently.

At this same time a unique programming activity began in Athens. A house on South Lumpkin reverted to the Community Programs unit, which made it available to Learning in Retirement. Soon it became a meeting place for small classes

that would otherwise have been canceled as well as for a book club, a quilting group, a bridge club and a genealogy interest group. After LIR left the Georgia Center, these groups and some more recently formed have continued to meet in various places, and they provide a special kind of small group programming benefit for members.

Officers 1999-2000

Robert Jordan, Pres.
Carol Fisher, V. Pres.
Corwin Mokler, Sec.
Bruce Bailey, Treas.

Board Members (99-01)

Richard Anderson
Mary Ann Crane
Joe Harris
Doris Schieman
Pat Vickery

Another element of LIR programs began at President Bob Jordan's request – summer activities. These would provide a connection with LIR throughout the year and, it was hoped, retain more members. Over the years these summer activities have ranged from coffee breaks at local coffee houses to wine tastings, a trip to see the Greenville Braves and a trip to the Fox Theater to see a musical, an ice cream break or a dinner at a local restaurant.

As Learning in Retirement entered its fifth year (1999) it became apparent that the sponsorship agreement that had served so well would have to be changed, and the Gerontology Center and the Institute for Higher Education both agreed to act as co-sponsors at the University. In late spring, Dr. Dejoy announced that the Georgia Center would no longer sponsor LIR, but that LIR could become a part of her new program for seniors. This new program would be purely academic and would feature peer-peer learning. There would be no social events other than registration meetings and no travel. She did offer to sponsor us at the Georgia Center for one more year while we looked for a new place to meet. At a special membership meeting convened later that spring by President Jordan, the members voted unanimously to continue Learning in Retirement as it had been operating, with classes taught by experts in their area, social activities, and study-travel opportunities. Committees were already busy looking for new places to hold classes and for ways to finance the organization after separation from the Georgia Center.

Officers 2000-2001

Diana Cerwonka, Pres.
Carol Fisher, V. Pres.
Corwin Mokler, Sec.
Ken Friedrich, Treas.

Board Members (00-02)

Gerry Dailey
Ruth Ike
Richard Morgan
Grace Rabek
Pat Rohr

In the last year of the affiliation with the Georgia Center, Diana Cerwonka was president. She worked to plan for a future outside of the Georgia Center. Several years before this, LIR had created a separate checking account for separate newsletters for sending out information about social and travel-study events. These funds had been nurtured and enhanced and combined with early dues payments, provided a financial cushion for the expenses of re-establishing the organization. With regular programming continuing, elections were held in the spring of 2001 even as the deadline for separation on June 30, 2001 approached.

Officers 2001-2002

Richard Anderson, Pres.
Ruth Ike, V. Pres.
Don Vickers, Sec.
Ken Friedrich, Treas.

Board Members (01-03)

Roland Brooks
Greg Crane
Kathy Gratzek
Marie Moran
Ruthann Walton

Officers 2002-2003

Richard Anderson, Pres.
Ruth Ike, V. Pres.
Don Vickers, Sec.
Jim Jacobson, Treas.

Board Members (02-04)

Carol Fisher
Nancy Heyl
Keren Hymo
Ed Speir
Sharon Tate

Officers 2003-2004

John Rudy, Pres.
Kathy Gratzek, V. Pres.
Diane Box, Sec.
Jim Jacobson, Treas.

Board Members (03-05)

Roland Brooks
Temple Ferchau
Jeani Goodwin
Sylvia Hutchinson
Albert Ike

Officers 2004-2005

John Rudy, Pres.
Kathy Gratzek, V. Pres.
Diane Box, Sec.
Jim Jacobson, Treas.

Richard Anderson was elected president and served for two terms. Committees were appointed and went to work planning classes and other activities. In August 2001 many things came together: we got a response to our request to the Vice-President of UGA for rooms at River's Crossing, we established a telephone answering service, and we made arrangements with Windsor Press to format the newsletter and get it printed, addressed and mailed. Registration was set for September 12 at the River's Crossing. On September 11, 2001, terrorist tragedy struck in New York City and Washington, D.C. Many businesses and schools were closing, but President Adams announced that The University of Georgia would be open as usual. The turnout for registration was large; the conversation understandably revolved around the tragic events of the previous day. River's Crossing was a perfect place for the classes; they were state-of-the-art, and the faculty and staff were welcoming to the LIR members.

By the end of the 2001-2002 year, membership approached 200 people. Since we did not have to pay for classrooms or portions of any staff salaries, membership fees were set at \$35 per person, and course fees were \$3 per session (to pay for our parking). Event fees were set at cost. We acquired a new partner at the University, the Department of Lifelong Education, Administration and Policy, a department of the College of Education. The Athens Area Community Council on Aging provided space and friendly counsel.

As the membership grew, additional classes and programming were needed. Classes were too full or there were conflicts with other scheduled classes or with travel-study trips. The Curriculum Committee scheduled repeat classes of some of the most popular classes, worked with other committees to avoid conflicts if possible, and even gave priority in some classes to those who had not taken the class recently. The contributions of time and talent by University of Georgia faculty, both active and retired, is recognized as the great strength of the organization.

The first board liaison for activity groups was appointed, and the board determined it needed to know more about the membership. Greg Crane followed through with a survey of membership, highlights of which were printed in the spring 2003 newsletter.

At the Annual Meeting of 2003 John Rudy was elected to the first of two terms as president. These next two years were a period of organization building, program and membership growth. Another independent contractor was engaged to assist

Board Members (04-06)

Louis DeVorsey
Joseph Harris
Sandy Jordan
Janet Stratton
Inge Whittle

Officers 2005-2006

Albert Ike, Pres.
Jim Jacobson, V. Pres.
Peggy Cole, Sec.
Stephani Foss, Treas.

Board Members (05-07)

Ron Cerwonka
Gerald Firth
Leo Jensen
Mary Munnell
David Rosenzeig

Officers 2006-2007

Jim Jacobson, Pres.
Janet Stratton, V. Pres.
Peggy Cole, Sec.
Clarissa Finco, Treas.

Board Members (06-08)

Ann Crowley
Tony Cushenberry
Jeni Goodwin
James Kissane
Kay Shinn
Natalie Wellman

Officers 2007-2008

Janet Stratton, Pres.
Jim Tanner, V. Pres.
Peggy Cole, Sec.
Clarissa Finco, Treas.
Joseph B. Harris, Liaison to
Washington-Wilkes
Chapter

with class enrollment and registration, Ms. Amy Munnell. She also collects fees for travel-study trips and for some social events. In addition, work was underway by Jim Jacobson to complete the process of becoming an approved 501.C3 organization under the Federal Revenue Code. Learning in Retirement is not only a not-for-profit, but a full-fledged charitable organization, recognized under both state and federal law

In 2005 Al Ike became president, and the growth in membership increased not only the workload of the committees, but the need for coordination. President Ike and the Board of Directors appointed a Long Range Planning Committee, co-chaired by Past President John Rudy and Board Member Jay Shinn. The committee worked with the LIR academic partner, The Department of Lifelong Learning, Administration, and Policy. In collaboration with LIR members, the Department created and administered a member survey.

By the beginning of the 2006-2007 year, under the leadership of President Jim Jacobson, the findings of the survey began to provide guidance to the Board of Directors. An early result was to appoint a Member Service Committee under the leadership of Vice President Janet Stratton. This group worked to ensure that new members received a timely welcome and orientation to the organization. The Curriculum Committee workload was studied as in six years the number of courses offered had expanded from 8 to 24 each semester. A partner at the University, the Department of Life Long Learning, Administration and Policy was helpful by assigning a doctoral graduate assistant to help with many of the Curriculum Committee tasks.

Finally, the Long Range Planning Group and the Board have refined the Mission Statement and the focus of Learning in Retirement, clarifying the importance of senior learning. In addition, the organization's commitment to the maintenance of quality relationships with partners and sponsors within the University and the community at large was re-emphasized and renewed.

With the election of Janet Stratton for 2007-2008, the organization continues with membership growth and quality programming. To cover the increased costs of professional services to support this growth, the membership voted for an increase in membership dues from \$35 to \$40, and a charge of \$5 per class hour. These increases became effective July 1, 2007, the first increase since the organization became independent in 2001. Learning in Retirement, Inc., is positioned for continued

Board Members (07-09)

Anita Brannen
Bill Flatt
Kathy Gratzek
Jane Kelly
John Songster

Officers 2008-2009

James Tanner, Pres.
William Flatt, V. Pres.
Peggy Cole, Sec.
Clarissa Finco, Treas.

Board Members (08-10)

William Alworth
Olga Gray
Steve Kassay
Jeanne Roth
Arlene Zimmerman

growth and for quality programming in curriculum, travel/study experiences and social events.

Examples of courses from these years are: Georgia and the American Revolution, The Great Decisions series, The History of the English Language, and Strength Training (in the this course, LIR Members receive expert instruction from graduate students enrolled for credit with the University's Department of Exercise Science and guided and supervised by senior active faculty.

The Washington, Georgia Chapter studied Greco-Roman Architecture. As an outgrowth of the class, the members developed and then compiled written descriptions of twelve of the Greco-Roman styled houses in the historic part of Washington, Georgia. Joseph Harris served as chair of the Washington Chapter various times during this period.

Currently, Learning in Retirement provides about 24 courses per semester in Athens. These include an eclectic mix of history, drama, geology, philosophy, religion, politics, health and biology, plus computer instruction. The instructional model continues to include active and retired University faculty, LIR members, and community professionals, all serving as volunteer instructors. These people deserve much credit for the contributions they have provided to Learning in Retirement and its growth and success. The Curriculum Committee leadership for the last several years has been Jeani Goodwin, with able contributions from Sue Speir for several years, and then a large group of members who have participated in various important leadership roles.

Other member services have been created including lectures with a catered meal. This Lunch and Learn Program enables Learning in Retirement members to hear top-notch people on important topics. Due to the growth in size of the organization, a special orientation period to help new members become familiar with the various programs and its operation has been provided at Registration. This has become a Fall or Winter Welcome to the semester's classes and all our other programs.