



MESSAGE FROM THE PRESIDENT

Happy Spring!

First, I would like to take this opportunity to congratulate our three newly elected members of the Board of Directors who will assume their duties in September. They are Barbara Kincaid, Keith Morgenheim, and Michael Redding. Our volunteers are the reason ElderStudy has continued to excel and grow, and without them we would not be able to continue to offer the variety of presentations and events that we all value.

Next, I am happy to report that new and renewed memberships continue to pour in to the treasurer and we are now approaching a new all-time high total of 325 enrollments. Thanks to all our volunteers for helping make this unimaginable growth possible.

Finally, I am proud to be a member of ElderStudy and hope you will enjoy the remainder of this "school year" and the celebration of our 25 years of learning in retirement, and that you too, will consider being a part of our volunteer army!

Warm regards,
Jack Allison, President

[www:elderstudy.com](http://www.elderstudy.com) what you need to know, when you need to know it!

ADMINISTRATION REPORT

The Administration Committee met on February 28 to prepare for the mid-year Board of Directors Meeting (March 7) and the mid-year General Membership Meeting (March 21, postponed by snow). The Treasurer presented a very thorough and detailed preliminary mid-year financial report.

Under Unfinished Business, the Committee was informed that efforts to identify a potential candidate for the Committee chairperson position, with a term beginning in late August 2018, have not been successful. Members having a potential interest in the Committee chair position should contact Jack Allison or John Thompson before mid-May; annual approval of Committee Chairpersons normally occurs at the Board's June meeting.

Under New Business, the Committee initiated the 2018-2019 Budget Planning Process. Inputs for the 2018-2019 budget need to be submitted to John no-later-than May 10th so that a preliminary budget proposal can be discussed by the Committee at its next meeting on May 30. Approval of the 2018-2019 Budget and associated membership fees by the Board is scheduled for June 6.

Also under New Business, the Committee initiated the annual review process relative to the Policy and Procedures Manual. Proposed revisions to P&P are to be provided to the Admin chair by August 10 so that consolidation of proposed revisions may be reviewed by the Committee at the end of August and subsequently presented to the Board at its September meeting. One recommendation submitted by the Curriculum committee relative to clarification of "program sponsor duties" has already been verbally approved for implementation.

Comments and questions relating to the Admin Committee report should be addressed to John Thompson (email: johnsafet@cox.net or phone 371-4827). As a reminder, the next Administration Committee Meeting is scheduled for May 30 at 1 PM in the ElderStudy classroom.

CURRICULUM COMMITTEE REPORT

We are well into our spring schedule and our sponsors have been active completing our fall program schedule. The top five topics for spring 2018 are: history and politics with 11 programs followed by tours, galleries & museums with 6, medicine & healthcare with 6, book group with 5 and UMW, Fredericksburg & Virginia with 4. Marc Leepson's program on Saving Monticello - The Levy Family's 89 Year Stewardship has had the highest attendance so far with 70 members and guests followed closely by Scott Walker's program From Tuscany to Virginia - Italians in the New World with 69 and Elaine Flynn's program Alice Roosevelt and Dorothy Parker with 66.

Our book group will discuss A Man Called Ove by Frederick Backman on 12 April and Conclave by Robert Harris on 10 May. Helen Housley will discuss the play Medea by Euripides on 11 April at the Klein Theatre. The play will run at the Klein Theatre from 12 to 22 April. Our spring gallery tour hosted by Rosemary Jesionowski will be held 11 April at the Ridderhof Martin Gallery. We will tour Ferry Farm on 18 April and Kenmore Plantation on 9 May. Contact Michelle Esbenshade if you are interested in going on these tours. Our end of year Potluck Luncheon will be at the Spotswood Baptist Church on Thursday, 24 May starting at 11:30 am. Check our newsletter, our website or the printed program at the CLL for details.

We have scheduled 39 programs for fall 2018 including 5 tours, 4 book groups and 2 play discussions. Our work-in-progress includes another 5 as yet unscheduled programs. Mary Washington ElderStudy has planned 1,824 programs over 50 semesters from the fall of 1993 to the spring of 2018, for an average of 36.5 programs per semester.

Here are the highlights from the programs of Marc Leepson and Scott Walker.

Saving Monticello: The Levy Family's 89-Year Stewardship of Thomas Jefferson's 'Essay in Architecture' The noted historian, journalist and author Marc Leepson presented a lively account of Monticello's ownership after Thomas Jefferson's death. He provided the fascinating details that surround Monticello's owners and how they twice saved the house from ruin. (Sponsored by Charlie Fennemore)

From Tuscany to Virginia, Italians in the New World Most people think of Italian-Americans as entering this country, sailing by the Statue of Liberty, winding through health checks at Ellis Island into the cities of the industrial Northeast. This talk focused on a group in the 1700s brought to Virginia to cultivate grapevines. Their ancestors are still here. We listened to the full story of this interesting slice of Virginia history. Wine and Thomas Jefferson were involved. (Sponsored by Mary Ann Stana)

MEMBERSHIP COMMITTEE REPORT

The Membership Committee remains in full operation, despite the fact that we are in the final quarter of the year. Our membership continues to grow, having reached 321 enrolled as of March 20! Welcoming new members is just one of our responsibilities, and we have been quite busy in that regard!

The final activity of our 25th Anniversary Celebration will take place at our Spring Pot Luck Luncheon on **Thursday, May 24**, at 11:30 am, at the Spotswood Baptist Church. The church is located at 4009 Lafayette Blvd., in Fredericksburg. Attached to this newsletter is a flyer sharing additional information, including what to bring. During this luncheon, we will recognize attending charter members of our organization. In lieu of musical entertainment, we will have a special presentation of the History of ElderStudy compiled by Joe Alfred. To make your reservation, please phone or email Carolyn Sulima (540-786-4648 / cmsulima@yahoo.com) by May 7.

ElderStudy is fortunate to have a strong core of volunteers who make the operation of our organization so robust. As our membership grows more volunteers are needed to perpetuate our busy agenda of providing lifelong learning experiences to seniors. The Membership Committee, for example, has vacancies in positions that are vital to our organization. Please consider not only attending sessions but joining one of our committees! The next Membership Committee meeting is April 12, at 10 am. Please join us!

Members are reminded to keep their roster information up to date and submit changes to membership@elderstudy.info. New members are encouraged to pick up their permanent name tags in the back office of the classroom. We also ask everyone to help identifying members who have been infirmed or suffered a loss in their family so we may reach out to them.

TREASURER'S REPORT

Treasurer's Report to the Membership
General Membership Meeting March 21, 2018

The mid-year financial reports review show that ElderStudy has sufficient funds from Membership Fees to cover the approved 2017-2018 budget and for consideration of Year End Grants to University Departments whose faculty presented curriculum programs during the 2017-2018 year. The required Capital Reserve is intact. A recommendation regarding the grants will be addressed at the May Administrative Committee meeting and the June Board of Directors meeting.

In recognition of the 25th Anniversary of ElderStudy the Board approved one-time expenses for an additional scholarship to be awarded for the 2018-2019 Academic Year to an eligible student enrolled in the Bachelor of Liberal Studies (BLS) program, funds for the purchase of an American Flag for the ElderStudy classroom and to cover costs related to celebrating the 25th Anniversary at our two luncheon events. Additionally, an amount of \$462 was added to the membership committee budget due to purchasing a several year supply of lanyards for new member nametags. This amount is offset by additional membership fees.

I would also like to thank Dottie Meyers for agreeing to continue to be the "second set of eyes" for the monthly reconciliation and for reading today's report as I am out of state visiting family.

Respectfully submitted,

Bryn Pavek, ElderStudy Treasurer

**Mary Washington ElderStudy
2017-2018 Operations Report #5**

3/7/2018

BOD Approved

Yes

Accounting Category/Subcategory	2017-2018 Approved Budget (8/7/2017)	2017-2018 Amended Budget	YTD 3/31/2018 thru 2/28/2018	% of Plan
INCOME				
Membership Fees	\$18,240.00	\$18,290.00	\$18,481.00	113.2% (a)
Name Tag Replacement Fees	\$0.00	\$0.00	\$5.00	
Interest from Certificates of Deposit	\$0.00	\$0.00	\$15.93	
Miscellaneous (includes replacement name tags)	\$0.00	\$0.00	\$18.44	
Membership Special Funds Fees	\$0.00	\$0.00	\$2,332.00	(b)
Curriculum Off-Site Fees	\$0.00	\$0.00	\$0.00	
Total ES Income/Revenue	\$18,290.00	\$18,290.00	\$20,834.44	
EXPENSES				
Board of Directors				
BLS Scholarships	\$2,600.00	\$2,600.00	\$2,500.00	200.0%
Election Expenses (copying, printing)	\$200.00	\$200.00	\$0.00	
Grants (from excess 2017-2018 Funds)	TBD	TBD	TBD	
Classroom Contingency	\$0.00	\$0.00	\$0.00	
Subtotal BOD	\$2,800.00	\$2,800.00	\$2,500.00	
Curriculum Committee				
Speakers/Programs (Aug-Jan)	\$7,600.00	\$7,600.00	\$4,176.00	66.7%
Postage/Mailing/Copying	\$125.00	\$125.00	\$31.35	25.5%
Off-site Location Programs	\$0.00	\$0.00	\$0.00	
Gifts/Gratuities	\$25.00	\$25.00	\$0.00	0.0%
Stationery/Supplies	\$100.00	\$100.00	\$126.00	126.0%
Special Activities	\$0.00	\$0.00	\$0.00	
Subtotal Curriculum Committee	\$7,750.00	\$7,750.00	\$4,332.85	
Administration Committee/BOD				
General Operating Funds	\$200.00	\$200.00	\$225.00	
Stationery/Supplies/Publications	\$0.00	\$0.00	\$309.21	
Postage/Mailing/Copying	\$700.00	\$700.00	\$4.90	
Subtotal Administration Committee	\$900.00	\$900.00	\$539.11	
Membership Committee				
Brochures/Rack Cards	\$100.00	\$100.00	\$0.00	0.0%
Stationery/Supplies	\$200.00	\$200.00	\$53.15	26.6%
Gifts/Remem. Items	\$200.00	\$200.00	\$0.00	0.0%
Name Tags	\$400.00	\$482.00	\$670.97	(n)
Newsletter/Communications	\$300.00	\$446.00	\$520.88	41.1% (n)
Postage/Mailing/Copying	\$250.00	\$260.00	\$158.00	62.1%
Web Site (renewed Feb 2010 for 2 yrs)	\$125.00	\$178.00	\$179.00	143.2% (n)
Telephone Services (C. Inc.)	\$300.00	\$300.00	\$132.00	44.0%
Membership Meetings/Spe. Events	\$1,200.00	\$1,200.00	\$2,348.18	195.7% (n)
25th Anniversary (One Time Expense)	\$500.00	\$600.00	\$300.00	60.0% (d)
Subtotal Membership Committee	\$4,075.00	\$4,537.00	\$4,160.11	
Total ES 2017-2018 Expenses YTD	\$14,275.00	\$15,987.00	\$11,582.07	

- a. Mem. Fees Total= \$404 One Plus= \$13,776 in early fees; \$4231 YTD fees after Sept 1, 2017.
- b. IncomeSpecEv=\$2420 Less \$88 refund Hol Luneh.
- d. Expense Mbr mtrgs \$230.25; Hol Lun \$2,409.93 is total \$2048.18 Note: Includes 20th Ann. Expense.
- n. Amendments are reallocation by Treas Under 3%
- o. Amend 1 \$482 by Bd new layards memb. growth.

**Celebrating ElderStudy's 25 Years
Spring Potluck Luncheon
Thursday, May 24, 2018**

**Spotswood Baptist Church
4009 Lafayette Blvd.,
Fredericksburg, 22408**

**11:30 am to 1:00 pm - Lunch and Socializing
1:00 pm to 2:15 pm - 25th Anniversary Celebration**

If your last name begins with:

- A - H Bring a Meat or Vegetable Casserole**
- I - P Bring Vegetable or Fruit Salad**
- Q - Z Bring a Dessert**

Beverages will be provided by the Membership Committee

To Make Your Reservations:

**Phone or email Carolyn Sulima (cmsulima@yahoo.com) by Monday, May 7
Reservations made by email or left on voice mail will be confirmed.**

Please provide:

- Your name(s)
Contact info (phone and/or email)
Number attending**

**If you have questions, please call:
Eugenia Jones – 540-786-8987 or
Carolyn Sulima – 540-786-4648**

**Park close to the playground at the right side/back of the building and go in
the door at the inside corner of the playground, towards the steeple.
For more information, see the bottom of the Curriculum Class Locations
webpage or enter the web address:**

www.elderstudy.info/Curriculum/CurriculumClassrooms.html#Potluck