

AN INFORMAL HISTORY OF THE FIRST FIVE YEARS  
of the  
LEARNING IN RETIREMENT INSTITUTE  
AT GEORGE MASON UNIVERSITY  
1991-1996  
by  
Shirley R. Fox

*Since nineteen hundred and ninety one,  
When LRI had just begun  
Many hours have been invested  
By members to do tasks requested.  
Mentioned below are only a few  
Of those to whom many thanks are due.*

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## **LRI HISTORY 1991-1996**

### **I. ORIGIN**

In 1984, Kathryn Brooks, then Chair of the Education Committee of the Fairfax County Commission on Aging (COA), was asked to research educational opportunities for senior citizens in the Washington metropolitan area. She became aware of the Institute for Learning in Retirement (ILR) at American University in Washington, DC which had been started in 1982, and recommended the establishment of a similar Institute in Northern Virginia. An ILR is an association of persons who seek intellectual stimulation in academic study after retirement in an environment with no tests, degrees or prerequisites. There are over 100 such institutions today based on the example of the Institute for Retired Professionals established in 1962 at the New School for Social Research in New York City. Many belong to the Elderhostel Institute Network established to create local Institutes. LRI is a member and participates in regional conferences of the Network.

The Commission on Aging approved Kathryn's recommendation and a brochure was developed and distributed among senior groups describing the proposed Institute and soliciting membership. A special survey published in the Golden Gazette of the Area Agency on Aging generated a high level of interest.

Ken Plum, Director of the Fairfax County Public School's Office of Adult and Community Education, offered his own time and the help of staff member Carol Ferrara to get the Institute started. George Mason University was approached to be a sponsor of the Learning in Retirement Institute (LRI), but initially declined arguing that its program of allowing seniors to audit University courses on a space available basis adequately met the needs of the elderly. Finally, after receiving many letters from state legislators supporting the establishment of an Institute at the University, the President of the University, George Johnson, agreed. In May of 1990 he assigned Dr. Marjorie Haley, his Special Assistant, to be liaison for the project.

In July 1990 a steering committee to organize LRI was established consisting of Carla Pittman, Director of the Fairfax County Area Agency on Aging, Kenneth Plum, Kathryn Brooks, Thea Johnson, then chair of the Education Committee of COA, Carol Ferrara, and community activists Sheila Coates, Esther Eisenhower, George Felton, Shirley Fox, Dorothy Millner, Alixa Naff, Martha Poling, Knox Singleton, Lilyan Spero, and Ellis Woody. Thea Johnson became Chair of this committee. Abe Spero volunteered to serve as legal advisor and later obtained corporate and 501(c)(3) status for LRI, which enabled it to receive tax-free contributions.

By January 1991, the first bylaws, Board of Directors and officers were approved. The officers were: President, Kathryn Brooks, Vice President and Curriculum Chair, Shirley Fox, Secretary, Martha Poling, and Treasurer, George Felton. Other Board

members were: Sheila Coates, Esther Eisenhower, Alixa Naff, Henry Shenker, Dorothy Millner, Lilyan Spero, Donald Simpson, Thea Johnson, Edward Strait, Audrey Markham, Fredona Gartlan, Martha Ford, Evelyn Wade, and Ellis Woody. President Brooks declared that the first semester should be in the Spring of 1991, and curriculum development and administrative activity accelerated to a hectic pace. Shirley Fox became President in 1992 and was succeeded by Lilyan Spero in 1993. In 1994 Laura Cambern was elected President and served for two terms.

## II. ORGANIZATION

The first bylaws, adopted in 1991, reflect a study of the bylaws of many other Institutes for Learning in Retirement but included many unique features. The LRI at George Mason University is an independent entity at the University but is not formally affiliated with it. Most similar institutes are creations of the continuing education departments of the colleges or universities with which they are affiliated, receive financial support and staff from the schools, and must meet conditions of financing, courses, and faculty determined by the schools. The LRI has a mutually beneficial relationship with GMU. LRI has provided the computer expertise of two of its members to teach GMU faculty and staff and has enhanced good will toward the University throughout the local community and in the State legislature in Richmond. The General Assembly of the Commonwealth of Virginia, in February 1993, passed a House Joint Resolution introduced by Delegate Kenneth Plum that resolved "That the State Council of Higher Education for Virginia, the Virginia Community College System, and the Commonwealth's institutions of higher education be encouraged to support the establishment of 'Learning in Retirement' institutes and organizations." The Senate patrons included Joseph Gartlan, whose wife had been a member of the first LRI Board.

The first bylaws, which have been revised twice in minor ways, established a Board of nineteen members, fifteen directors and four officers elected by the members at large. The term of office was three years and Directors could serve no more than two consecutive three-year terms. The offices established were: a President who "shall preside over all meetings...shall appoint committees...and serve as liaison with the University"; a Vice President who "...shall serve as Program Committee chairperson"; a Secretary, and a Treasurer. Standing Committees created were: Executive, Finance, Program, Auditing, and Nominating.

An annual meeting is held each Spring at the close of the semester to elect six Board members, one third of the total Board.

The bylaws were reviewed in 1993 and amended to reflect the first three years of LRI's operating experience, and amended again in 1995. The major changes provide:

1. That officers of the Institute shall be elected by an 18 (down from 19) member Board of Directors, not by the general membership. (A proposal to reduce the number on the Board to 12 or 15 was rejected.)

2. The Board of Directors shall serve primarily to set policy, approve budgets, oversee the operations of the Institute and employ appropriate staff (not act in an administrative capacity as previously).

3. The Vice President "shall direct the activities required in the planning, development, coordination and implementation of the Institute's various programs" ( not serve as Program Chair as originally provided).

4. The Secretary, in addition to taking minutes of all Board meetings, shall serve as Archivist and Parliamentarian.

5. The President shall appoint chairpersons of committees who shall then name the members of the respective committee. Chairpersons shall remain in their positions until they are replaced by the President or resign.

After the 1995 revision, a Coordination Committee was established consisting of the Chairs of all the Committees and presided over by the Vice President to coordinate the day-to-day activities of the Institute. Standing Committees in 1995 were: Finance and Budget, Membership Services, Outreach, Program, and Publications. The Coordination Committee meets monthly. Committee Chairs may or may not be members of the Board. In the beginning, each member of the original Board was responsible for a Committee. The current thinking is that the experience gained by serving as Chair of a Committee is good preparation for possible service on the Board.

The Program and Coordinating Committees generally meet once a month, as does the Board of Directors. Meetings are open to members, and the dates are included in the LRI newsletters.

(For further detail, see the Administration Handbook in the office.)

### III. ADMINISTRATION

LRI is a membership-run organization dependent on volunteers. From the formal beginning of LRI in 1991 until 1994, Carol Ferrara was the only paid employee as the part-time Administrator of the Institute, having begun her work to establish LRI in the office of Adult and Community Education of Fairfax County during the exploratory period of the Steering Committee (See Origins). As the Institute has grown, so too has her paid help, space, equipment and computers. From a donated #8086 in 1991 she now has two "state-of-the-art" computers in the office. In 1993, after much negotiating, an IBM PS/2 was donated by the company to LRI, thanks to the generosity of our first computer teacher, Kenneth Oates, who had retired from IBM after 35 years of service,

and was entitled to one computer through IBM's Fund for Community Service. That computer is now being used, along with four other computers purchased by LRI in 1995, in the Computer Workshops taught by Ray Beery. LRI members with computer skills are now volunteering in the office. At the beginning, several members volunteered to use their home computers for LRI business. Henry Shenker, a member of the Steering Committee and first Board of Directors, took responsibility for registration and membership records. That responsibility has now been transferred to the LRI office.

Classes for the first semester of LRI in April of 1991 were held in one room of GMU's Commerce II Building on University Drive, which served both as a classroom and office for our Administrator. A desk, donated by a sympathetic occupant of the building, was later placed in the large entry lobby of the building, where Carol and volunteers could operate while classes were being held. The lobby also served as the site for our first open house and a place for students to gather between classes for coffee and chatting.

Carol and LRI officers worked at the Commerce Building under conditions that could only be called "chaotic". When classes were held in the joint office/classroom all administrative activity moved to the foyer. But despite the occasional high decibel level there, LRI was warmly received by most other occupants of the building.

GMU could not offer more space because the University was also having classroom space problems. However, the Recycling for Life program on the second floor of the Commerce Building offered us one classroom that was not being used until late afternoon. This room enabled us to expand from the original 14 courses to 20 courses in the fall of 1991.

It became evident that other space had to be found. Fortunately, both the City and County of Fairfax recognized the value of our program for local senior citizens. The Mayor of Fairfax City, John Mason, agreed to let LRI use a community room in City Hall on Wednesday afternoons, free of charge. LRI used this room for several years until the City found it necessary to charge for space and require reservations several weeks prior to each use. A request to Kate Hanley, a member of the Fairfax County Board of Supervisors, resulted in the Board approving the free use of space under lease by the County in Fairfax City but not being used by the County. LRI was then able to hold classes in space in the Alcohol and Substance Abuse Program (ASAP) building, and in classrooms of the Office for Children in the Golds Gym Building on Main Street. Additional space was also provided in the Juvenile Justice Courthouse of Fairfax County. Although the scattered locations reduced the opportunities for socializing and compounded administrative problems, the members demonstrated their resilience in finding their classes and their commitment to LRI.

Then in February 1994 we learned that it would be necessary for us to relinquish by March 3 of that year our space in Commerce II. After extended negotiation with GMU

and with the help of President Lilyan Spero, her husband, Abe Spero, who was a member of the Board of Visitors of GMU, and Joseph Haestie, Rector of the Board, an agreement was signed with the University for a five year lease of Tallwood Annex on Roberts Road, with optional one year renewals. LRI finally had a home of its own. Members could now attend classes, large and small, and socialize between and after classes over coffee and cookies; and Carol could have an office solely for administrative activities. The move to Tallwood enabled increased membership and activities, and with the attendant additional mailings of publications and notices, membership and financial record keeping, and other added tasks it became evident that volunteer efforts needed to be supplemented by a part-time paid assistant to Carol, and Jenny Green, a student at GMU, was hired.

The relationship with GMU continues to improve. Joanne Johnson, the wife of GMU's President, has taught several LRI classes, and President Johnson received a certificate, displayed in his office, proclaiming him a lifetime member of LRI. Almost one fourth of our teachers are now current GMU Professors, who volunteer their time. But LRI has been able to retain its independence regarding its curriculum and financial management, unlike many other LRIs.

The 1994 reorganization of LRI clarified the administrative responsibilities of the Board and the standing committees, but Carol remains the "glue that holds us together", as she was described in the early days.

(For more details, see the Administrative Handbook in the office.)

#### IV. PROGRAM

##### Background

The strength of LRI is largely determined by the quality of its course offerings. Two eight-week semesters are held in the spring and fall, and two four-week semesters in the winter and summer. Since the beginning, classes have been held for one-and-a-half hours one day a week. Special events and social activities are also scheduled. The summer term may not include regular courses, but offer lectures and special events. There are no exams and no credits. No minimum formal education is a prerequisite for membership, but most classes are at the college level. Members register for classes according to preference of classes offered.

Class discussion is encouraged. All teachers are unpaid volunteers. Most courses are led by experts, frequently an LRI member with professional expertise, and may include individual visiting lecturers or a panel of persons still working in the field. Many LRI member/teachers are retired government officials, especially foreign service and CIA

officers, economists, and former professors. Other courses are taught by non-LRI members and by current GMU faculty. The June 1992 issue of the Mason Gazette, "A Faculty and Staff Publication of George Mason University," included a notice that LRI is "seeking volunteers from the faculty to teach non-credit courses" and described the Institute. Some classes do not have a "teacher" but are based on material distributed to the students for discussion led by a member. An example: "Great Decisions", included in the curriculum many semesters, uses primarily material prepared by the Foreign Policy Association that is updated annually. The first year, new teachers were invited to an orientation to teaching adults, conducted by two GMU professors of Education: Arthur Chickering and Ed Jones.

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The first semester offered 14 classes in eight subject areas: Art, Economics/Finance, History, International Relations, Languages, Literature/Writing, Philosophy, and Politics/Government. These categories still reflect members' interests, but have been expanded and modified over time; e.g. the Spring 1996 catalog of 26 classes includes the category of Science and Technology and also Computer workshops.

Special forums and a distinguished lecture series were held in the early semesters. GMU Robinson Professors were tapped, including Roger Wilkins, Mary Catherine Bateson, Hugh Hecllo, and Robert Hazen. Just before leaving GMU as a Robinson Professor, Alice Rivlin, now nominated to be Vice Chairman of the Federal Reserve Board, discussed her views on how to balance the federal budget and achieve economic growth. Sarah Lawless, Director of the Institute of the Arts at GMU, came to tell members of the programs of the Institute and offered discounts for group attendance at particular performances. As a result, members have attended several opera performances at reduced rates, with LRI member, Helene Layman, a former opera singer, providing advance explanations of plots and playing important arias.

The first lecture in an annual series planned to honor Kathryn Brooks, founder and first President of LRI, was held in 1995. Almost 100 persons attended.

The members are surveyed periodically about new courses they would like to have presented, courses they would like to have repeated or different courses they would like to have taught by a current teacher. The program committee generally is able to fulfill the requests; e.g. an Economics Issues course with guest lecturers covering topics of current interest drew large registrations and was repeated for several years.

GMU Professors presenting courses frequently comment favorably on the inquiring minds of LRI members, in contrast to undergraduate students taking a required course. Professor Sam Di Bonaventura of the GMU Music Department has enjoyed teaching at LRI since 1992 in the Spring and Fall semesters. He first offered a survey course, and then music of specific periods from the Baroque Period to the 20th Century, and for the Spring '96 semester is presenting Nationalistic Music. Science courses have



become popular, and GMU Professors have taught courses on the cell, astronomy, and geology. The Winter '96 semester included an innovative course, "Tapping Into History," taught by Judy Allen, a GMU Professor of Dance who discussed tapes of famous dancers such as Bojangles Robinson, Gene Kelly and Fred Astaire. Diplomats and senior members of Embassies have also been lecturers and discussion leaders, and a course on the Genome Project of NIH was taught by participating NIH scientists. A list of course offerings since the beginning of LRI is available in the office.

In 1996 the Poetry class, which has been meeting since 1991, will publish a book titled, "The Poets of Tallwood," containing 42 poems by 14 poets. Five members of the class have also been published in "The Poet's Domain". Art and writing classes have also become popular and a book discussion club meets monthly.

In recent years, Special Events have included, in addition to special lectures and discussions, trips to museums, walking tours of nearby historic sites and bus trips to farther sites. Members enjoy the opportunity for social contacts as well as the programs which these events provide. Additional opportunities for socializing are provided at Pot Luck lunches and at the Open Houses held at the beginning of each eight week semester.

From the beginning, scheduling of classes has been a major challenge in order to accommodate teachers' preferences and space available. Many erasable pencilled entries on a large grid in the early years have now been superseded by the computer.

## V. MEMBERSHIP

### Background

"Persons who subscribe to the mission and guiding principles of the Institute and pay dues in accordance with procedures established by the Board of Directors qualify as members" according to the bylaws as amended in 1995. LRI is an equal-opportunity institution, and does not discriminate on the basis of race, color or national or ethnic origin.

Annual dues were set in 1991 and remain at \$200, which entitle members to attend as many classes and special events as they wish, subject to space availability and/or teacher requisites. An experiment of half-year membership at \$125 was discontinued after a year.

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In the early days, the names of potential members and teachers were kept in shoe boxes under Carol Ferrara's desk at the Fairfax County Adult Education offices. Publicity about the founding of LRI in the Golden Gazette, local journals and the

Washington Post caused interested seniors to ask for catalogs and some even sent in \$200 membership fees before a curriculum was developed. George Bain with a home PC volunteered to enter these names into a computer.

By the Spring of 1991 almost 100 members were enrolled for the first semester. Additional recruitment efforts included mailings to persons in nearby zip code areas who had attended Elderhostels, a speakers bureau that provided LRI members to discuss the program at meetings of appropriate organizations, publicity in local journals and the Washington Post (a list of publications contacted then and subsequently is included in the Administration Handbook), staffing of tables at community fairs, and most importantly word-of-mouth.

Membership has grown to almost 300 in the Spring of 1996 confirming the desire for educational programs at the college level by senior residents of the area. Of the original members, about one third are still participating as members, teachers and volunteers. But despite continued efforts since the beginning, we have not been successful in attracting many minorities.

## VI. PUBLICATIONS

Publications, both internal and for outside distribution, have become important means to keep members and the community informed of LRI activities. At the first Open House in the lobby of the Commerce Building, LRI member Garrett Ruhl offered to use his home computer to do clerical work and produced our first catalogs and the first newsletter. When he needed time to prepare the courses he offered to teach, Marjorie White took over the production of these publications and has been responsible for the catalogs and the quarterly newsletter, LRI News, since the fall of 1992.

Starting in the fall of 1993, Michael Styles, our Vice President from 1994-1996 and a charter member of LRI, has been producing weekly "LRI Notices" during the fall, winter, and spring semesters. These describe not only LRI events but also performances and lectures on the GMU campus of interest to our members. In addition, Michael has been formatting the catalogs at home on his computer from the copy provided by Marjorie.

## VII. THE NEXT FIVE YEARS

*In our first five years we've achieved a lot  
A comprehensive program we have got.  
Our membership is steadily growing  
As are our courses, with knowledge flowing.*

*Whenever certain skills are needed  
Requests for help are always heeded.  
Our members are a social lot  
(As long as the coffee pot is hot).*

*May the next five years continue the trend  
of LRI's success. May it never end.*