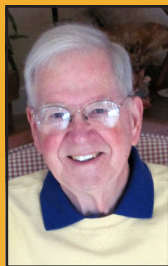




2015

Spring Newsletter • Osher Lifelong Learning Institute at Dartmouth



President's Corner

By now you will have read or heard the exciting news that our offices have moved to 7 Lebanon Street in downtown Hanover, but, as you can well imagine, with a project of this size and scope, there's a

back story that I'm sure you will also be interested in reading about.

Members of OSHER@Dartmouth and its leadership have known for years that our offices on the second floor of the DOC House left much to be desired. Our staff has had very little space in which to work, desks were too close to each other; the cramped space was far too noisy for the efficient running of an office, and you couldn't stand up straight in some of the office area without the risk of hitting your head on the ceiling that follows the roof line to its peak. It's been great to open the office door and be greeted immediately and warmly by Sara Andrews or Sarah Chamberlin, but it has meant that their work was constantly being interrupted by members and visitors coming to the office. Until very recently the coffee enjoyed at breaks in classes downstairs had to be made upstairs and carted down that narrow staircase every time the pot ran dry. And, of course, there was little if any room for the host of volunteers who are so important to the smooth functioning of the organization. The staff and volunteers have been great and made do, but everyone knew we were in need of new quarters.

In September of last year, the Leadership Council determined to seek better office space, identifying that as our number one priority. In fact, it was decided that none of the Osher Endowment income would be allocated until we had successfully addressed this problem.

C. J. Smith, who you know by now, passed away tragically and suddenly at the beginning of March, was our Treasurer and one of our most sought after Study

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The 2015 Osher Summer Lecture Series: The Future of American Power and Influence



This year's Summer Lecture Series Committee has created an exceptional and timely program.

The six-session series, commencing on Wednesday, July 15 and running successive Wednesday mornings through August 19 in Dartmouth's Spaulding Auditorium, will examine whether recent internal and external challenges are eroding American power, along with the perception of America's influence and resolve. If true, what needs to be done to address the challenges?

Prominent specialists in several fields will focus on this over-arching question from different perspectives such as military, economic, and media influence.

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Study Leader Profile: Beth Perera

Beth Perera's life, and perhaps even the title of her OSHER@Dartmouth courses, could easily be "It's Never Too Late." Born, raised, and educated (initially) in Columbus, Ohio, Beth was on track for an extremely successful career in the corporate world. But, some medical issues had her rethink her diet and a whole new chapter in her life came into existence. And now we have the pleasure of counting her among our invaluable Study Leaders.

As I think about it, when you read through Beth's resume and chat with her for a while as I did in preparation for this profile, it's not too surprising that her career took such a dramatic shift. I don't recall being able to declare a major when I was in high school, but apparently at Upper Arlington High in Columbus you could, and Beth lists her majors as Visual Arts and English and her minors as Russian and Ceramics. Clearly, even at a young age, she was open to a wide variety of academic and cultural pursuits.

Fast forward several years and several relocations, and Beth now lives in Goshen, Vermont having been drawn back here not because her children live here (although one of



her two daughters does live nearby) but because of her fondness for the area born out of her summer camp experiences in Hancock, VT when she was just a child. "I just knew that I'd end up in Vermont," said Beth, when I asked her how her latest move came about.

So, let's go back to Beth's career path switch. I'll let her share with you the nature of the actual health issues if she chooses to, but suffice to say they needed work and she wasn't pleased with standard Western medicine's approach. So, Beth read and studied and virtually

cured herself through diet and healthy lifestyle choices. "I was so smitten by my success that I wanted to share my experience with others, so I took my knowledge to another level," said Beth. Over the next few years, she received a Plant-Based Nutrition Certification from the T. Colin Campbell Foundation for Nutritional Studies, a Food For Life Nutrition & Cooking Certification from the Physician's Committee for Responsible Medicine, and The Starch-Based Solution Certification from The McDougall Program, and began her new career.

Beth was introduced to Osher by her aunt, Hanover resident and Osher member Carol Weingeist. Beth's first Osher class, Food for Life: The Power of Food for Health has been extremely well received. She plans to teach it again, so stay tuned. However, in the fall she will be teaching a new class entitled: Eating Plant-Based Food for Your Health and Our Environment – Nutrition, Cooking, and Commentary. Sounds like another winner.

- Jeff Bendis

Notes From the Finance Committee

Welcome to the first in a series of **Notes from the Finance Committee** in which we will share with you details about the financial operations of OSHER@Dartmouth. Over the next few newsletters, we will look at the various sources of income, dispel some myths about our finances, and look at where all that money is spent in order to provide you with stimulating and thought-provoking educational opportunities.

The Finance Committee manages four different funds: our General Operating Fund, the Friends of OSHER@Dartmouth Fund, the Memorial Gifts Fund, and our new Osher Endowment Fund. In this edition of **Notes** we will focus on the income side of the General Operating Fund, which as the name suggests, is the account through which we deposit our income and finance all of the activities that members enjoy.

Myth #1 – OSHER@Dartmouth receives direct financial support from Dartmouth College

While we do purchase certain services, such as accounting, and we rent office and classroom space at the D.O.C. House from Dartmouth at a deeply discounted rate, and while our members enjoy interaction with the college's academic faculty in some of our courses, OSHER@Dartmouth

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Finance Committee (cont.)

is financially self-supporting. We receive no direct financial support from Dartmouth.

Total income or revenue for our most recent financial year, ending June 2014, was \$403,819. The pie

grant from the Bernard Osher Foundation that enabled us to enhance and promote our offerings. The grant (\$66,162 or 16% of 2014 revenue)¹ is not available for future years, but we are now the proud recipients of a \$2

terly revenue and expense forecasts. Our latest forecast for FY2015 projects that we will once again come close to revenue and expenses being in balance at year's end on June 30th.

All of our financial transactions and records are managed by Dartmouth College and we owe a huge vote of thanks to the Provost's Office and the Finance Center for the excellent service that they provide.

We hope you find this information helpful. Please send any questions or comments to the Osher office; some-

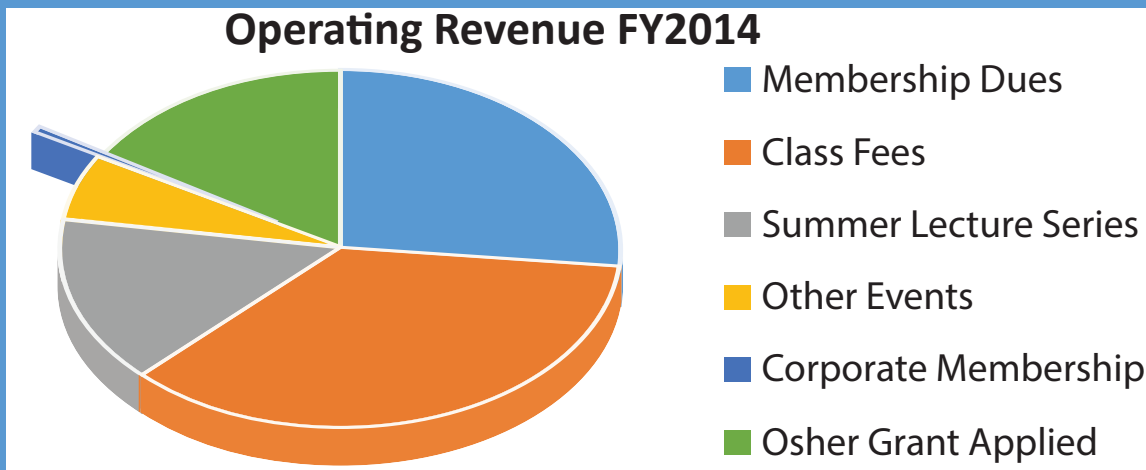


chart (see image) shows the main sources of revenue. While these numbers are for financial year 2014, they are typical of other recent years with the exception of the Osher grant money. The notation FY in the pie chart and elsewhere in this article stands for Fiscal Year. (An organization's operating year is known as a fiscal year.) OSHER@Dartmouth's fiscal year runs from July 1st to June 30st because Dartmouth's fiscal year runs from July 1st to June 30th and it's important that our fiscal year tracks with theirs.

The two biggest contributors to our Operating Revenue were membership dues (\$107,080 or 27%) and fees paid by participants for our fall, winter, and spring classes (\$144,412 or 36%). The Summer Lecture Series contributed \$59,660 or 15% of revenue in FY2014, while other activities such as Special Lectures and Events accounted for \$24,005 or 6% of revenue. We also ran a pilot program with Hypertherm for which they generously made a corporate donation of \$2,500 or .6%. In fiscal year 2014, we also had the benefit of a large portion of the initial \$100,000

million endowment from the Osher Foundation. By investing the endowment money, we will enjoy additional income for years to come. We will discuss the endowment fund in more detail in a future newsletter.

Myth #2 – With such a large amount of revenue, OSHER@Dartmouth is making a lot of money every year

Each year the Finance Committee works with the OSHER@Dartmouth leadership and office staff to develop a budget for both revenue and expenses. At the end of each financial year, we are never far from achieving a balance, but in some years we have a small surplus (+5% in FY2014) and in others a small loss (-3% in FY2013) for example. To even out this ebb and flow, we maintain a cash reserve that we can draw on in lean years and replenish in years when our revenue exceeds our expenses.

During each fiscal year, the Finance Committee performs quar-

one from the Finance Committee will get back to you.

Your Finance Committee always welcomes new committee members. While a number of our committee members have accounting backgrounds, this is not an essential qualification. We welcome individuals who have experience in accounting, managing budgets, fund raising, operations and change management. If you are interested in joining this committee, please contact Lisa King in the Osher office.

Last, it is with great sadness that I heard of the death of C.J. Smith just as we were putting the final touches to these "Notes." Over the last several years as the OSHER@Dartmouth Treasurer and Chair of the Finance Committee, C.J. worked tirelessly introducing many improvements to our financial reporting processes. It was a pleasure to work with C.J. He will be greatly missed.

- Iain Sim

Chairman, Finance Committee

¹ The balance of the Osher \$100,000 grant was spent in fiscal years 2013 and 2015.



OSHER@Dartmouth Open Forum Summary

On Wednesday, October 29th, 2014, OSHER@Dartmouth held its very first Open Forum meeting. This special event was intended to provide our members and volunteers with a venue that would allow them to ask questions and receive information about our program, our future plans, our recent activities, and any other topic they wished to discuss. The forum took place in Filene Auditorium, and no admission was required to attend.

A panel of five people was in place to help guide the opening of the forum and provide answers. This panel consisted of board members, officers, committee representatives, and staff, and included current OSHER@Dartmouth President Stew Wood, committee member Tom Blinkhorn, past President and current Nominations Committee chair Pete Bleyler, Treasurer C.J. Smith, and Program Manager Lisa King. In addition, several other committee members and study leaders were present in the audience, and provided occasional clarification to some of the questions raised by others in the audience.

Questions asked during the Open Forum included the following:

Q: Is the parking in front of the D.O.C. House for the golf course only, or for the D.O.C. House as well? It's very confusing!

A: Both our program and the golf course are part of the Dartmouth community, and the marked spaces along the hill are intended to be shared, despite any signage that appears from time to time. Parking guides are provided to all members in their course welcome packets, along with a map of acceptable locations. Osher members should refrain from parking in the gravel lot at the foot of the hill, just



as golf course members should refrain from parking in the horseshoe drive at the front of the D.O.C. House.

Q: Was ILEAD in financial trouble when approached by Osher?

A: No. ILEAD was not in a financial crisis.

Q: Then what are the advantages of becoming an affiliate [of Osher]?

A: We are now one of 118 institutions affiliated with the Osher Foundation. The opportunity to share best practices is invaluable. We have a chance to learn from their experiences. Stew and Lisa attended their first national conference of Osher Institutes in the spring of 2014, with positive results. They each came back with a great deal of knowledge and information, and with connections that have proven invaluable for our program. The strength of our connection with Osher will help make our organization more vibrant. We have received guidance from other institutions regarding online registration, and our additional funding will allow us to take advantage of innovative ideas generated by the curriculum and other committees.

Q: (Further follow up to previous question.) What I've seen so far is the loss of a great name and an increase in the cost of classes and the Summer Lecture Series.

A: Our costs have increased over the last few years just as everyone else's have – it's just taken longer for us to reflect that increase in our charges for

courses and the summer series admission. These increases would have happened with or without the Osher affiliation.

Q: Is it likely in the future that there will be some payment for Osher teaching?

A: While the panel acknowledged the dedication of our study leaders, and our reliance on them to keep our program strong and vital, one of our core values has always been volunteerism. All study leaders are volunteers and that is part of what makes this institute great. Other institutes frequently contact the office to make inquiries about this aspect of our program, and are always impressed by the high level of skill and knowledge our study leaders are willing to share without expectation of payment.

Q: (Referring to a membership graph illustrating our membership levels) What has happened to our membership? Has it levelled off?

A: Our current membership is at 1500+. While we need to be ready for the "Silver Tsunami" (referring to the expected increase in potential members as the Baby Boomer generation reaches retirement age), we cannot get too far ahead of ourselves, as we need to maintain the quality of our program. A recent study of area residents performed by students at the Tuck school provided insight as to our program's local perception and interest from current and possible future community residents.

In addition to the Q&A portion of the forum, several participants volunteered opinions, comments, and statements about our program, including the following:

"The study leader's voice is the most important part of maintaining the quality of our program."

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President's Letter (cont.)

Leaders. Some time ago, C.J. put together a proposal for new office space as well as additional classrooms with appropriate parking. This was a global picture of what we hoped for. Dartmouth of course has many departments that have their own hopes for the future, and it didn't appear that a new building or new space for OSHER@Dartmouth was on the horizon. This time, however, C.J. took photos of our office staff in action which highlighted the difficulties under which our staff was working and clearly showed the challenges our then-present office space presented to our staff and membership. In the fall, not long after our Leadership Council had made its decision about the priority of seeking new office space, those photos were presented to the Provost's Office. Together, we went to work seeking a solution.

In the past, when the issue of our cramped office space arose, searches were conducted throughout the Upper Valley. None of these searches were successful for a host

of reasons – lack of adequate parking, ease of accessibility, too high a rent, etc.

After an internal search of available Dartmouth space by the Provost's Office, we received a phone call just before Christmas with an invitation to visit one of the commercial properties owned by Dartmouth in downtown Hanover. It was love at first sight!!

The offices are on the ground floor and were recently vacated by another Dartmouth entity. It has 1,600 square feet of space, four offices, and a spacious reception area.

The Hanover Parking Garage is just to the east of these offices, as are the Salt Hill Pub and Talbots. Immediately across the street is the entrance to the Spaulding Auditorium, and the Upper Valley's community bus service stops right at the front door. The space is easily accessible for everyone. The money we had set aside to meet this well-identified need is more than sufficient to cover the cost of the move, some needed modifica-

tions, and the annual rent.

We all owe an enormous debt of gratitude to C.J. Smith for his remarkably crafted documenting of our current situation, and to the Provost's Office for sticking with this project and solving our most-pressing problem.

We will be holding a series of open houses after we finish getting settled in. Please join us if you can.

Earlier in this column I mentioned the Osher Endowment. Many of you have expressed interest in knowing how this endowment affects our organization and also how our finances operate in general. This issue of the Newsletter debuts a regular column regarding OSHER@Dartmouth finances. Iain Sim, the incoming Chair of the Finance Committee, will seek to make you all aware of where our funding comes from and how it's spent.

- Stew Wood

Open Forum (cont.)

"Online registration and use of Google Drive have been great but hard for some members."

(Referring to the Tuck study.) "The Tuck study revealed that OSHER@Dartmouth is NOT populated solely by Dartmouth-affiliated people. 65% of

members have no direct connection with the college. Osher is their only connection to Dartmouth College."

(Referring to multiple Fall '14 courses that addressed the same topic.) "Communication is vital, and errors...(like that)... should not happen in future."

"I like the Teach One Take One program!"

- Compiled by Sarah Chamberlin,
based on notes from multiple
Open Forum attendees and participants

Give a Gift of Limitless Value!

Looking for the perfect gift for a friend or loved one? When you present someone with their very own OSHER@Dartmouth gift certificate, you are offering them a chance to stimulate their mental abilities and exercise their social skills, which are gifts beyond measure! The OSHER@Dartmouth office is happy to provide gift certificates for any amount you wish. Certificates can be used to purchase a new membership, or to register for a course.

Contact us today!

Call (603) 646-0154, or email osher@dartmouth.edu

Summer Lecture (cont.)

Here is the schedule of speakers and topics:

July 15

America's Global Leadership

Speaker: David Rothkopf
CEO and editor of the FP group,
publishers of *Foreign Policy* magazine

July 22

America's Economic Power

Speaker: Matthew Slaughter
Incoming Dean of Dartmouth Tuck School of Management;
Professor of Management & International Economics

July 29

America's Military Power

Speaker: Michael Kofman
Formerly with National Defense University, now a senior
fellow at the Woodrow Wilson International Center in
Washington, DC

August 5

America's Power and Influence as Perceived by the Media

Speakers: Marty Baron
& Elizabeth Bumiller
Baron: Executive editor, *The Washington Post*, former editor,
Boston Globe; Bumiller: *New York Times* Washington editor

August 12

America's Entrepreneurial Power

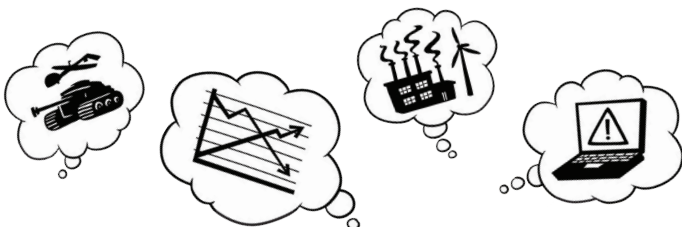
Speaker: Scott Sandell
General partner and head of New Enterprise Associates
Technology investing operations

August 19

The Future of America's Power and Influence

Speaker: Honorable Robert Rae
Former leader of Canada's New Democratic Party,
Canada's first Provincial NDP Premier

Watch for a special mailing with extensive details of the topics, expanded bios of the speakers, and ticket sales information. In the meantime, mark your calendars!



SAVE THE DATE!!!

Osher at Dartmouth

24th Annual Meeting and Luncheon

Wednesday, May 20, 2015

Featuring Guest Speaker

Richard Norton Smith

Acclaimed

U.S. Presidential Historian

This year our annual meeting and luncheon will be under the tent at the Quechee Inn at Marshland Farm in Quechee, Vermont on Wednesday, May 20, 2015. Registration and a cash bar will open at 11:15 with lunch at noon. The cost of the luncheon will be \$30 including tax and gratuity. Formal invitations will be mailed to all OSHER@Dartmouth members in early April. Reservations need to be made by Friday, May 15, 2015. As usual, there will be a choice of vegetarian and non-vegetarian entrees from which to choose.

The annual meeting is a special occasion at which we recognize and honor all of those individuals who volunteer their time to teach a course or serve OSHER@Dartmouth in many other ways. These volunteers form the backbone of what makes OSHER@Dartmouth so special. Additionally, the Campion Award will be given to a member or members who have given outstanding service to the organization.

In keeping with the special nature of our celebratory luncheon, we are pleased to announce that the acclaimed U.S. Presidential Historian, Richard Norton Smith, will be our guest speaker. A prolific, prize-winning author and director of several presidential libraries, Mr. Smith will reflect on how the office of the U.S. President has changed, is changing, and what it portends for the future. This should be a wonderful presentation. To quote Mr. Smith, "There's no excuse for a dull book, a dull museum, or a dull speech especially when dealing with history - the most fascinating subject I know."

Please put May 20th on your calendar. You will not want to miss this special occasion as our 24th year of courses and special events draws to a close.

OSHER@Dartmouth To Celebrate 25th Anniversary Year

Twenty-five years ago, in September of 1990, a group of concerned Upper Valley citizens established a program at Dartmouth College dedicated to offering seniors educational opportunities. The program was named the Institute for Lifelong Education at Dartmouth, or ILEAD. In 2014 ILEAD was awarded a two million dollar endowment by the Bernard Osher Foundation to benefit our program, and we renamed ourselves OSHER@Dartmouth. This year we are going to celebrate our twenty-five year history by honoring our founders, volunteers, study leaders, members, and our relationship with Dartmouth and the Upper Valley with special events and activities throughout the year.

Ginia Allison, Diane Crowley and I have formed a Twenty-Fifth Anniversary committee. Care to join us? Plans are still in the works, but here are some of the events that are already scheduled or are being considered:

- From June 19th through July 18th 2015, there will be an exhibition

of work by our 'fearless foursome' art teachers, Winkie Kelsey, Stephanie Reininger, Ann Semprenon, and Jo Tate at the AVA Gallery in Lebanon.

- On September 10th the annual Study Leader and New Member Party will include anniversary-related activities.
- On November 7th a Book Fair featuring authors who are study leaders and members will be held at the DOC House just in time for your holiday gift buying.
- On December 3rd the annual Holiday Party honoring our volunteers will include anniversary-related activities.

Other events under consideration include:

- A craft exhibition and sale of items created by OSHER@Dartmouth members
- Art and photo exhibits of works by OSHER@Dartmouth members
- A concert by OSHER@Dartmouth musicians

- A theater evening by OSHER@Dartmouth actors
- An OSHER@Dartmouth Literary Journal highlighting writings by our members and study leaders
- Courses on 'Arts in the Upper Valley' around Woodstock, Hanover, Lebanon, and WRJ
- A special speaker and program honoring our founders, past presidents, and volunteers at our Annual Meeting
- A special anniversary-related presentation at the Summer Lecture Series
- An evening of Literary Readings
- A big party in August of 2016 as a finale.

If you have any other ideas to enhance this milestone year or would like to join in the planning, please email me at sylvia.paxton@gmail.com.

This will be a very special year in our history. Thank you for your anticipated contributions and support.

- Sylvia Paxton

Host(ess) Wanted!!

We're looking for the hostess with the 'mostest' or the host with the most! (or perhaps a couple with the most and 'mostest')

Do you love parties? We need you to plan and organize our OSHER@Dartmouth social gatherings, which include the fall party for study leaders and new members, the winter party for all Osher volunteers, the literary evening in the spring, and the annual meeting in May

(and possibly other special functions as needed). A small committee is already in place that helps with the food and assists in making these events happen; they simply need a leader!

If taking charge is not your style, you might consider serving on the com-

mittee in some capacity. We are always in need of bartenders, plus those willing to make hors d'oeuvres or to help with serving. It is just one more way to be actively involved with OSHER@Dartmouth!

Does this sound like it's up your alley?

If you're willing to consider this opportunity to be our Hospitality Chair and to help make our social gatherings all they can be, please contact:

Sandra Johnson at snjohnson@valley.net or
Sylvia Paxton at sylvia.paxton@gmail.com

We are happy to answer any questions you may have!





OSHER @ Dartmouth

Discovering the new. The provocative. The timeless.

7 Lebanon Street
Suite 107
Hanover, NH 03755
603.646.0154
OSHER@dartmouth.edu
<https://osher.dartmouth.edu>



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Lisa's Corner



Dear Members and Friends,

Osher at Dartmouth cannot run without your help!

We are looking for volunteers who could help in various ways through the year, for a few hours a week, or a few hours a month!

The office needs help at the reception desk at 7 Lebanon Street, assistance in setting up classrooms at the D.O.C. House during our fall, winter, and spring terms, help in distributing catalogs and hanging posters at your local library, doctor's offices, etc., and even finding and recruiting study leaders!

Several of our committees are also in need of new members. It's

your chance to make a positive

impact on how our program functions! Our Curriculum, Finance, Marketing, Study/Travel, Membership Services, and Volunteer committees are all seeking new members!

If you are interested in helping out our great organization by becoming part of one of our committees, helping spread the word about our upcoming classes and events, or volunteering to help the office staff, please contact us by e-mailing osher@dartmouth.edu, or call us at (603) 646-0154.

Thank you!