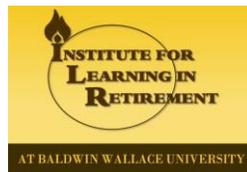


ILR TODAY

Vol. IX, No. 1

February 2024



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President's Message

by Doug Imhoff, President



We are just now winding down our ILR 2024 Winter Quarter. Once again, it was a session with many talented and competent presenters teaching our classes, and we hope our members enjoyed the learning experience. Our six-week **2024 Spring Session starts on April 1** and we are offering in-person classes as well as several Zoom courses.

Our ILR **St. Patrick's Day Luncheon** will take place on March 6, and our **Book and Author Luncheon** is on May 15. A complete calendar of upcoming ILR events and dates is included in this newsletter. We hope all of you will enjoy our upcoming spring classes, trips and luncheons.

One key item I would like to share is that we will be distributing \$24,000 in scholarships to several deserving individuals in May this year. I am pleased to report that, **over the last 25 years, we have given out approximately \$500,000 in total scholarships**. We believe this is a very worthwhile cause and extend our thanks and appreciation to you, our ILR members, for your generous contributions to the scholarship fund during the past quarter-century. **Learn more about ILR scholarships** in Past President Bob Ross's article on page 2, describing the mutual support among ILR and BW.

Spring 2024 Class Registration Begins March 3



(Photo by Mary Kolk)

Spring class online registration will run **from 12:01 a.m. March 3 until 11 p.m. March 16**. We will also offer in-person registration from 10:15 a.m. to 11:45 a.m. on March 4, 5, 7, 8, 11 and 13 at the ILR office at 325 Front St., Berea (parking is available in the back, off of Adalbert Street).

Additionally, as of 10 p.m. March 16, **ILR annual memberships will be unavailable** until July 1, 2024.

Spring Session to Feature New Instructors and Courses

by Pam McConnell, Chair, Curriculum Committee

Spring is in the air! At least we can pretend, even though winter is still with us. Looking ahead to our Spring Session courses, ILR is pleased to introduce **Julie Koenig**, who will teach a course on British Royalty. Julie comes highly recommended, which is an added bonus for those of us who are loyal Anglophiles. She also comes to us from her native England.

Bobbie Dorr is returning to ILR with two courses about working with watercolors. Bobbie has been teaching watercolor classes at the Strongsville Historical Society for more than 20 years.

Cheri Homaee will teach an advanced course on drawing in addition to the basic drawing course.

The good news is that **ILR and the Cleveland Metroparks** will be holding outdoor classes in both the spring and fall. These classes are limited to 20 participants each, so don't wait too long to sign up. As always, our instructors plan for new courses so we can continue to provide fresh content for our members. **Half of the courses offered this spring are new to our catalog.**

Think of warmer temperatures and days of longer sunlight. The Spring Session offers many exciting opportunities, and we look forward to seeing you soon.

ILR Scholarships Support Baldwin Wallace Students

By Bob Ross, ILR Past President



Congratulations! If you are reading this as an ILR member, you belong to **one of the largest senior-education organizations in the nation**. The purpose of this article is to acquaint you with our commitment to helping students achieve their higher-education goals through financial support.

First, let's take a moment to review a few of the ILR guiding principles:

- We were **founded in the early 1990s** in a Berea living room with retired BW professors and seniors who wanted to further their lifelong learning opportunities.
- We have grown over the years and currently total **more than 1,400 members**. Our various functions include classes, luncheons, travel and helping others through modest donations.

ILR provides support in a number of ways:

- We **pay rent to area churches** for classes held on their properties.
- We **contributed \$20,000 to the BW Military Legacy Project** and received a letter of appreciation from university President Bob Helmer.
- **ILR has provided \$21,000 in scholarships each year** since 1992. (The one exception was a \$21,000 member contribution in 2020 to cover a funding shortfall caused by COVID.) Starting **in 2024 this amount is increasing to \$24,000**. Awards are given to specially qualified students who each receive a \$3,000 scholarship. Qualifications include: nontraditional undergraduate student, over age 24, returning to earn a four-year degree. One award is also made to an individual pursuing a graduate teaching degree.

BW provides ILR with an office, computer network, phone, plus banking, copy, printing and mail services. We are also privileged to use the splendid BW food and catering services for various functions at extremely favorable cost rates.

We are grateful for the continued support we receive from Baldwin Wallace and look forward to keeping this relationship strong. *(Photo courtesy of Baldwin Wallace University)*

BW Ritter Library Resources Available to ILR Members

by Karl Keller, Chief Information Officer

In addition to adult learning, travel and social opportunities, **ILR members can take advantage of myriad resources at Baldwin Wallace's Ritter Library**. Members must stop at the information desk in the lobby to sign the guest registry and present a photo ID. If you plan to borrow books or DVDs, you should have a Cuyahoga County Public Library card to do so.



Members do not have access to library computers for software or email because those require BW network credentials. For general internet searches or research, the Ritter staff strongly **recommends that you make an appointment** with one of the librarians first. You can gain access with a librarian's assistance, but Ritter staff has to log you in, and this is available only during hours when a librarian is in the building.

Additional information about Ritter Library, including hours of operation and when librarians are in, can be found at <https://libguides.bw.edu/ritter-hours>. (Photo courtesy of Baldwin Wallace University)

Maria Phillips is Subject of Retirement Lifestyle Article



ILR Travel Co-Chair **Maria Phillips's personal approach to retirement** was featured in a recent issue of *Northeast Ohio Boomer* online magazine. The article, "[Turning What You Love into What You Do,](#)" was written by ILR instructor **Patrick O'Connor, EdD**. It focused on Maria's ability to successfully merge pre-retirement activities with new leisure pursuits, including her passion for continued learning through travel. Dr. O'Connor coined the term "Encore Retirement Lifestyle" to describe her retirement. According to Patrick, **the story generated a higher-than-usual level of interest among readers**. Any reader who wishes to share a thought or comment can do so at the end of the blog. (Photo by Dan Bomeli)

Meet New Friends and Advance ILR by Volunteering

by Bev Sadowski, Director of Volunteers

Great opportunities are available for members who would like to engage with others and help ILR through volunteering. Several options include:

- Working at the **ILR office** two hours per month, where you would be answering phones and following up on telephone messages
 - Contact **Bev Sadowski**
- **Host Coordinators (HCs)** – welcoming members, taking attendance and assisting instructors; HCs can participate in the class without charge. **We also have a need for anyone with an interest in coordinating Zoom classes**. If you are comfortable with working with Zoom OR are willing to learn, please consider this volunteer option.
 - Contact: **Patty Rondaris-Danzey**

- Helping at **special events** with scheduling, invitations, meeting arrangements and representing ILR at display tables during the event
 - Contact **Peggy Doyle**

You will receive any needed training should you be interested in any of the above choices.

To learn more, **contact the Help Desk** at ilrhelpdesk@bwu.edu and someone will get back to you in a timely fashion. Thanks in advance to any potential volunteers. We hope to hear from you soon!

How Many Committees Does ILR Have?

You have probably heard the names of various committees and volunteer leaders during your experience with ILR. To help with your general awareness and acquaint you with the chairpersons for each group, here is a current list:

- **Culture and Travel** – Maria Phillips and Tom Brennan
 - **Cultural Events** – Pat Giblin and Penny Jeffrey
- **Curriculum** – Pam McConnell, Don Auble, Scott Ross and Patty Rondaris-Danzey
- **Finance** – Gary Erlinger and Edith Newman
- **Marketing** – Beth Townsend
 - **Newsletter** – Dan Bomeli
- **Office Services** – Janet Bodjiak and Bev Sadowski
- **Registration and Membership Services** – Vacant
- **Scholarship** – Bob Ebert
- **Social** – Pam Aleandri
- **Technology Support** – Karl Keller and Doug Porter
- **Website** – Karl Keller and Angela Sternlicht

For more details about the responsibilities for each of the above areas, visit [The Institute for Learning in Retirement at Baldwin Wallace University in Berea, Ohio \(ILR\) \(ilrbw.org\)](http://www.ilrbw.org).

2024 Travel Schedule Includes 20 Trips

by Maria Phillips and Tom Brennan, Travel Committee Co-Chairs



A wide variety of travel adventures is available to ILR members and guests in 2024, based on our recent survey results. We had a good response and selected 13 multi-day trips and seven single-day trips for this year. Specific information for each trip was emailed to you and will also be posted on our website, [ilrbw.org](http://www.ilrbw.org).

We are working with three travel companies – **Nowak Tours, Great Day Tours** and **JKL Tours** – to provide one-day trips, two- or three-day trips and lengthier multiple-day trips. These are available to ILR members and their guest(s).

The travel process **requires members to work directly with the travel companies**, which are now updating trip information. For more details, pricing and reservations, please contact the travel company. All checks must be made payable to the travel companies and mailed to them with their trip application. Your payment ensures a seat for the trip on a first-come, first-served basis. A standby list will be maintained for trips that fill quickly. Deposits will be refunded by the travel companies according to their policies.

JKL Tours: 440-942-5350

March 27	Historic and Ethnic Cleveland, Part 1 – SOLD OUT ; <i>wait list only</i>
April 16	Historic Churches of Cleveland – SOLD OUT ; <i>wait list only</i>
July 14	Rabbit Run Theater and Winery
Aug. 6	Historic Marietta, Ohio
Sept. TBD	Canadian Theater Adventure
Dec. 2-4	New York City at Christmas with the Radio City Rockettes

Great Day Tours: 440-526-5350

May 9-11	Holland Michigan Tulip Time
July 24-25	Sleep in Caboose, Titusville and Oil City, Penn.
Aug. 6-7	Daniel in Lancaster, Pennsylvania
Aug. 29	Chautauqua Lake Region
Sept. 19	Progressive Luncheon Wine Tasting Tour
Oct. 8-11	The Bourbon Trail, Louisville
Dec. 12	Stan Hywet Hall and Gardens with Hartville Holiday Tour

Nowak Tours: 330-483-4900

April 21-26	Arizona Adventure
May 29-June 8	Norway and the Netherlands
July 9-14	Wisconsin Treasures
Aug. 9-16	California Wonders
Sept. 20-28	French Castles Tour
Oct. 6-10	Agawa Canyon and More
Oct. 17-20	Wild West Virginia

Any questions can be referred to the travel company or to Maria Phillips and Tom Brennan, Travel Committee Co-Chairs, at ilrhelppdeskbu@gmail.com.

Donating to Charity Using an IRA

By Gary Erlinger, Chief Fiscal Officer

You spent your working years saving up for retirement. But you also made sure you donated regularly to charity. Once you have retired, your income may be limited. Yet you do not want to give up on your philanthropic goals. So **how can you keep donating** to your favorite charity(ies) during retirement?

Money from an individual retirement account (IRA) can be donated to charitable organizations. What's more, if you have reached the age where you need to take required minimum distributions (RMDs) from your traditional IRAs, **you can avoid paying taxes** on the money by donating it to charity.

A distribution from a traditional IRA normally incurs taxes since the account holder did not pay taxes on the money when the money was paid in. But account holders aged 70½ or older who contribute directly from a traditional IRA to a qualified charity **can donate up to \$100,000 without it being considered a taxable distribution**. The deduction effectively lowers the donor's adjusted gross income (AGI).

Donors must follow IRS rules for qualified charitable distributions (QCDs) to avoid paying taxes on the donation. These are called charitable IRA rollovers. But keep in mind that you cannot claim a tax deduction for the amount donated.

Using an IRA to make a charitable donation can help lower a tax bill and help a worthy cause. **Distributions must be made directly to the charity**, not to the owner or beneficiary.

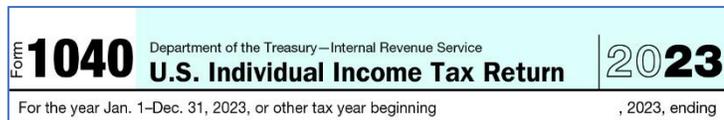
If you are interested in using an IRA to benefit a charitable organization, talk to your IRA custodian and be sure to leave sufficient time for funds to reach the charity.

Resources for Seniors in Taxing Times

by Elaine Joseph, ILR Today Committee

Guess what... it's tax season! Here is an option for getting your tax return done FREE.

AARP Foundation Tax-Aide provides tax assistance to anyone, free of charge, with a special focus on taxpayers who are over 50 or have low-to-moderate income. Tax-Aide volunteers are IRS certified and the Site Locator Tool is updated and available from February through April.



Visit https://www.aarp.org/money/taxes/aarp_taxaide/ or call **1-888-227-7669**. Provide your ZIP Code and you'll receive locations, hours of operation and phone numbers for assistance in your area.

Please note that ILR provides the above resources to enhance awareness, and that ILR does not necessarily endorse the organization, services or advice.

Lifetime Member Profile: Jane Cavanaugh, ILR Co-Founder

by Dan Bomeli, ILR Today Editor

Thousands of ILR members over the past 32 years have benefited from **Jane Cavanaugh's thirst for knowledge**. Jane, along with **Floyd Adams and Doris Snedeker** (both deceased), transformed an emerging trend in the early 1990s – adults attending evening or weekend college classes – into what we know today as ILR.

“We had read a 1988 study,” says Jane, “which concluded that **retired people who keep learning are happier, more social and generally more satisfied** with their quality of life.”

The trio organized a meeting in the spring of 1992, at which 15 attendees from the community expressed interest in additional learning opportunities. The ILR committee developed a “test”

course titled “Our Changing Time” and held another open house. More than 50 people attended and half of them signed up for the class. “We could see the pendulum swinging,” Jane relates. **“As they age, people still want to learn.”**



Jane and her co-founders, with the enthusiastic support of then-Baldwin Wallace President **Neal Malicky**, recruited professors and other educators to teach courses on a wide array of topics. Volunteers stepped up to organize an ILR office, draft bylaws, develop curricula and serve as instructors. Sensing a need for offerings outside of the classroom, Doris and Floyd created a travel program. In the ensuing years, ILR membership climbed steadily.

While working in the Admissions Office at BW, Jane earned her Ed.D. in higher education administration at the University of Akron. She retired as Dean of Continuing Education in 1998 and kept active through substitute teaching, volunteering at her church and working to expand and improve ILR. She is now a **Lifetime ILR Member**, an honor bestowed by the Governing Board to a select few. Jane and her husband, George, reside in Wickliffe.

From Jane’s point of view, ILR benefits its members in the following ways:

- Accommodating people who want **intellectual stimulation** and desire to **give back to their community** through volunteerism
- Improving satisfaction by **learning about an area of interest** (or topic about which the student has no prior knowledge)
- **Keeping the mind active** to help stave off boredom or, possibly in some cases, cognitive decline
- **Enhancing social interaction** and providing opportunities to develop new relationships

“People who continue to learn through programs like ILR,” concludes Jane, “live richer lives and, with better knowledge of their environment and humankind, help make the world a better place.”

More information about the history of ILR at Baldwin Wallace is available at [The Institute for Learning in Retirement at Baldwin Wallace University in Berea, Ohio \(ILR\) \(ilrbw.org\)](http://TheInstituteforLearninginRetirementatBaldwinWallaceUniversityinBerea,Ohio(ILR)(ilrbw.org)).

ILR Calendar 2024

Membership registration remains open for the 2023-2024 Membership Year **until 10 p.m.**

March 16. The ILR office is open from 10 a.m. to 12 p.m. every Monday and Friday.

- | | |
|----------|---|
| Feb. 19 | Spring Class Catalog posted on ilrbw.org website |
| March 3 | Spring class registration begins. Help is available from 10:15 – 11:45 a.m. at the ILR office, 325 Front St., Berea, on March 4, 5, 7, 8, 11 and 13 |
| March 6 | St. Patrick’s Day Luncheon (registration and payment details will be emailed to you) |
| March 16 | Spring class registration ends |
| April 1 | Spring classes begin |
| April 12 | Cleveland Pops Orchestra at Severance Hall: “Broadway Rocks” Cultural Event at 8 p.m. (registration and payment details will be emailed to you) |

- May 15 Book and Author Luncheon (registration and payment details will be emailed to you)
- May 23 ILR Annual Meeting at 10 a.m.
- May 28 Carl Fernstrum Concert at Strongsville United Methodist Church at 2 p.m. (details will be mailed to you)
- May 29 ILR Scholarship Dinner (Governing Board and scholarship recipients)
- July 1 Membership registration begins for the 2024-2025 membership year

In Memoriam



The ILR community is saddened by the Nov. 6 passing of **Lester Nichols, PhD**, at the age of 88. He was an ILR instructor and Lifetime Member. Dr. Nichols also maintained the ILR database and was a mentor to many.

Karen Frederick, a member since 2019, passed away recently. She was a frequent traveler on many ILR Trips.

If you know of an ILR member who has passed away and whom you would like to **memorialize in this newsletter**, please contact ilrhelppdeskbwu@gmail.com with details.

Quick Hits

ILR Office and Help Desk – The ILR Office at 325 Front Street is open every **Monday and Friday** from **10 a.m. to 12 p.m.** Feel free to stop in or call 440-826-3188 with questions. The phone line will be monitored on Mondays and Fridays. Also, the ILR Help Desk email address is ilrhelppdeskbwu@gmail.com for questions.

Connect with ILR and Share with Others --

Website:
ilrbw.org

Facebook:
https://www.facebook.com/groups/526562059407794/?ref=share_group_link

Become an ILR ambassador! Please share ILR membership and class information with your friends and colleagues, and be sure to pass along this newsletter.

ILR Today is published and distributed four times each year by the Institute for Learning in Retirement at Baldwin Wallace University. The newsletter team includes Paula Gustin, Elaine Joseph and Dan Bomeli. Send your feedback, questions or ideas to ilrhelppdeskbwu@gmail.com. If you send photos, be sure all identifiable people have given their permission to publish.

Food, Fellowship and Fun at the Holiday Luncheon

Photos by Paula Gustin and Dan Bomeli

