Celebrating 20 Years of Learning
Henry McMonagle formed the original committee, in April of 1993, to explore the formation of a Yavapai College Institute for Learning in Retirement.
On July 28th of 1993, right here in this Performance Hall, 175 people gathered to discuss the idea.

A new way of learning in retirement

BY CLAUDETTE SIMPSON
The Prescott Sun

Just because people are retired from jobs does not mean their minds are retired.

The nation-wide success of the Elderhostel program is a testament to the love of learning of retired people.

Now comes a new idea expanding the opportunities for learning for older adults.

It’s called “Institute for Learning in Retirement,” an affiliate of the Elderhostel Institute Network.

Henry McMonagle, director of Yavapai College Elderhostel, said Institute for Learning in Retirement is where senior citizens get together to form their own college in partnership with Yavapai College.

“People who are retired have lived a long, interesting life. All that talent and energy still exists, but how do they use it?”

“People who are retired have a lot of experience in life. Now they are looking for meaning in life,” McMonagle said.

He suggested people could search for meaning in subjects that interest them: Italian opera, 20th Century poetry, the lives and times of the Founding Fathers, writing, the impact of World War II on American life, music, study of languages.

“The possibilities of discussion groups are limited only by the imagination,” McMonagle said.

Nearly 200 Institute for Learning in Retirement groups have been organized in the U.S. in the last 15 years.

They are mostly self-governing and self-supporting. The basic idea of such groups, McMonagle said, is the study circle, where each person in the group is the teacher and learner.

The courses are created and conducted by the participants. There are no grades or exams. “There is just the pleasure and fulfillment of learning,” McMonagle said.

“The organization tends to be social. It’s a way for the college to provide service to the community. It also fills a social need for people who come here and have left family and friends.”

McMonagle said he expects learning in retirement groups to complement the Retirement College program.

“Elderhostel is behind the idea also. A lot of people in the Prescott area have gone to Elderhostel in other areas.”

What often happens, McMonagle said, is when “these people tend to have their educational and social needs satisfied, they then look to how they can help the community. Many take on community projects.”

This learning arrangement is not for everyone, McMonagle said. It is for those who enjoy fellowship and intellectual and cultural experiences.

If you are curious, there will be an informational meeting Wednesday, July 28, from 9 a.m. to 11:15 a.m. in the Performing Arts Center on the Prescott campus.

The concept will be explained by Yavapai College officials and by Henry Lipman, a guest from New York who has had experience with these learning institutes. There will be refreshments and an opportunity to ask questions.

“It’s an organization focused on learning. They decide what they want to learn, how they want to learn it, and how much to pay for it,” McMonagle said. “It’s under the college umbrella but it is self-supporting and self-governing. The benefits are multiple.

“The informational meeting is to find out if there is sufficient community interest to create this.

“My job will be to provide an administrative liaison and guidance. Then members decide what they want in terms of administrative involvement. It can be a thriving college-related program for the community which doesn’t cost taxpayers.”

Call the college at 776-2372 and let officials know you plan to attend the July 28 meeting. Or, drop a note to Henry McMonagle, Institute for Learning in Retirement, Yavapai College, 1100 E. Sheldon St., Prescott, AZ 86301. If you can’t attend, call or write to be put on the mailing list.
After committees were formed to develop a conceptual plan for facilities, sessions, governance, and fees, the college granted approval for the formation of an ILR in December of 1993. Ed Cornett was a member of the original steering committee.
Our first social event and launch party was held on February 11, 1994. In August of 1994, we reached a membership of 100. Our logo said “Learning is always in Season.” We were officially called the Yavapai Learning Institute, YLI. The logo was designed by Karen Oss.
Grace and John Sorauf, and Eileen Ferguson. John was our first Chair, Eileen our first board secretary.
Bev Harker-Baker was another founding member and facilitator.
Our first classes, Feb 18 - April 15 of 1994 were:

- Anyone Can Write
- Current Economic Issues
- Environmental Concerns: Fact or Fancy
- Global Village
- The Southwestern Experience
- A Systematic Approach to Decision-making
- Personal Finance for Retirement
- Poetry for the Public
- Point of View
- Speech Crafting
- Symbolism in Modern Art
- Travel Smarts
- The West of the Imagination
- Creating Plot and Character
By 1996, we were starting each fall term with a kick-off coffee, which in years to come expanded to a kick-off lunch and then to a kick-off party. The purpose has always been the same, to get started on our wonderful fall class line up.
By 1997 our Governing Council Chair was Walt Bull, Vice Chair was Andy Reti, Financial Officer, Roy Leroux, and our Secretary was Pat Beaugrand. If you recognize more and more of these names, it’s because so many of our members have been active for many, many years.
In 1999, the YLI Newsletter announced that we had increased our membership to 217 people, a growth rate of 72% over the previous year. Since then, the membership has grown steadily until the last several years, where the membership has hovered around 600 during any given session.
In 2000 a name change was considered, and suggestions included Methuselah’s Learning Institute, Learning for the Chronologically Enhanced and Learning for Fossils. We decided, in our infinite wisdom, to stay with Yavapai Learning Institute, which made us Ylites.
For the Love of Learning

For the Love of Learning was our new slogan developed by Dave Warner, and it is still in use today.
The year 2003 brought big changes to YLI. In that year, Henry McMonagle, after serving as our founder, director and chair, finally retired from his volunteer work on YLI and moved to Phoenix. We owe him a tremendous debt of gratitude for his foresight and hard work to get this institute up and running.
Also, in April of 2003, Dennis Garvey became the director of the Center for Successful Aging at Yavapai College.

Meet Dennis Garvey, expert on aging at Yavapai College

By Pete Peters
Lovin Life

That it was by accident that he wound up studying issues related to aging is unexpected, given the animation in his voice and obvious pleasure Dennis Garvey takes in his role as director of the Center for Successful Aging at Yavapai College.

In fact, not only was this subject not his first choice as area of emphasis at graduate school, it wasn't his second, either. The idea, though, of a couple of years at San Diego State University was irresistible when he and his young bride, Gerry, compared winter in southern California to those on Cape Cod.

“I've been grateful for making that choice ever since,” he smiles.

Except for that brief stint in California, Dennis lived in Massachusetts his entire life. Raised on “the Cape,” he earned an associate’s degree at Cape Cod Community College and finished his bachelor’s at Clark University in Worcester. A psychology major there, gerontology was low on his list of interests.

“I'd had little contact with older people growing up. I'd only had one grandparent, so it's a bit surprising to me even today, that I entered this field,” he said.

After receiving his master’s of social work degree at SDSU, he and Gerry returned to the Cape. There he organized a program for a private protective services agency for the aged and, when the Commonwealth of Massachusetts developed its program, he became a supervisor in the cabinet-level Office of Elder Affairs.

From there he went to Elder Services of Cape Cod and the Islands (serving Martha’s Vineyard and Nantucket) as associate director.

Joining his alma mater Cape Cod Community College, he served as the director of its Center for Successful Aging, followed by directorships at JML Adult Day Health Center in Falmouth, and at Falmouth Hospital’s Department of Older Adult Health Services. As president of Aging Insights, the consulting firm he founded in 1995, he helped organizations develop more effective marketing strategies and customer service programs targeting the aging market sector.

"Older adults, taken as a group, have far more disposable income than any other demographic groups, but points not targeted for them, " he says.

Moving to Prescott a year ago was more emotional for Dennis than he anticipated.

"People I've known most of my life would come up and say how they'd miss me and my family, and next thing you know, I'd be crying." Garvey remembered.

Although he left many friends back on the Cape, he says he has no regrets.

"It's interesting and exciting to be part of cultural change,” he says of his work with the college.

Additionally, he is a member of the Northern Arizona Behavioral Health and Aging Coalition, the Sedona/Verde Valley Task Force on Aging, and the Board of Directors of the United Way of Yavapai County.

"Exposing my 14-year-old son John to life in the southwest will be a good thing for him. and having my brother Dan here is an extra bonus,” he said.

Off hours you can find him playing the guitar, playing in his band or building his house.
In 2004, we received a grant from the Osher Foundation, and the Osher Endowments in 2007 and 2008. These additional funds allowed us to expand our services, our administrative staff, & our schedule of classes.
We made one major change when we received the Osher funding. We were no longer the Yavapai Learning Institute, but became the Osher Lifelong Learning Institute.
In August of 2004, we were able to add a part-time administrative assistant to help our wonderful administrator, Rita Wuehrmann. Barbara Yarrow joined the staff. Rita retired in April of 2005, and Barbara took over the reigns. Deni came on in 2005 to help Barbara.
One of our funniest groups in 2005 was the fashion show put on by Genny Ingram which included a few of our more illustrious gentlemen in drag.
Anticipating change and growth in 2006, we held a Long-range Planning Meeting which was heavily attended. Literally thousands of ideas came out of that meeting.
In the spring of 2006, Lesley Schuler gave us the wonderful new look that you will all recognize as our schedule.
Barbara Yarrow moved away in 2007, and Tricia Berlowe arrived to take over the reigns. Deni shifted to half time in 2012, and we welcomed “T” in the office. (And we are so happy Barbara is now back and running Community Education!)
Our number of learning groups are steadily increasing!

The valleys represent our summer sessions.
In 2008 the annual meeting included a brainstorming session around increasing the socialization within OLLI. Out of this meeting, our Special Interest Groups were born!

International Dinners, Book Club, Wine Tasting, Chess, Meditation, and Exploration of Consciousness are all current active SIGs.
We began the Summer and Winter Doldrums programs in 2009, to fill in the time between our sessions with fun social activities.
We keep evolving as a group!

• In 2010 we added our Ride Share program, insuring that members can come to class (thanks Diane McIntyre and Sharon Walsh for your tireless efforts!!)

• In 2011 we formalized our scholarship program. We raised thousands of dollars to support our members, and award between 15 and 20 scholarships a year.
We can’t thank our facilitators ENOUGH!!!!
THANK YOU FACILITATORS!
And thanks AGAIN!!!!!!!!!!
Be sure to check out our beautiful new honor board, celebrating our wonderful facilitators!
We love our holiday dinners and potlucks!
And we all know how important the cafeteria is to our OLLI members!
We turned 20 in 2013!
History of the Osher Foundation Relationship with Yavapai College

Rita Wuehrmann, administrator for the Prescott OLLI, came across an announcement for the Osher Foundation grants, and brought the information to Dennis Garvey. Dennis Garvey, Dean for the Division of Lifelong Learning, had also seen the announcement, and he opened communication with the Osher Foundation with the hope of pursuing funding. Applications to the Osher Foundation were by invitation only, and initially the Foundation expressed concern about the ability of a Community College to handle the potential endowment award. After many months, the Osher Foundation was sufficiently impressed with Yavapai College and the Yavapai Learning Institute and Elderhostel programs to invite our college to apply for a grant.

The initial proposal, authored by Dennis Garvey with the assistance of Rita Wuehrmann and Carol Bollinger, Yavapai College grant writer, was submitted in the fall of 2003, for a $100,000 grant. This grant was renewable for 2 additional years (for a total of 3 years), with the potential of an endowment gift of “no less than $1 million should the institute demonstrate potential for success and sustainability.” ([http://www.osopherfoundation.org/index.php?oll](http://www.osopherfoundation.org/index.php?oll)). A stipulation of the original $100,000 grant award was: “please note that the designation of each Osher-funded program as an ‘Osher Lifelong Learning Institute’ is a condition of the Foundation’s grant making, as is the use of a logo that consists of a simple circle with the words ‘Osher Lifelong Learning Institute’ arranged within.” (Request for Proposals (RFP): Osher Lifelong Learning Institutes September 2003)

At the time of the initial proposal from Yavapai College (November 3, 2003), YLI on the Prescott Campus had approximately 400 members. The Academy for Lifelong Learning in Sedona was just being established in the fall of 2003. The goals for this grant included the expansion of the programs in Sedona and the Verde Valley, increasing the participants within YLI, upgrading technology, and a survey of community needs. In quantitative terms, the goals were for YLI to grow by 15%, the Academy for Lifelong Learning to grow by 20%, and Elderhostel to grow by 5%.

The second year application was submitted in February of 2005. Enrollment trends were recorded as follows:

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<td>Sedona</td>
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<td>Clarkdale</td>
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The third year application was submitted in May of 2006. The cover letter of this application reported an active membership of 700 and an unduplicated head count of 1072 across all three campuses.

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<td>Sedona/Verde</td>
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<td>Totals</td>
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<td>700</td>
<td>875</td>
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*includes special seminars in Sedona

Yavapai College was invited to apply for the $1 million dollar endowment in September of 2006. The Osher Foundation requested the following information: a statement of University support, volunteer leadership, number of courses, number of unduplicated dues-paying members, other sources of support, management of the endowment, and any other comments. Nowhere in the application does it specifically state a target membership number.

One of the strengths of working with the Osher Foundation is that they aren’t driven by hard numbers – they look at the entire picture of a lifelong institute when considering an application for grants, and endowment. In reviewing all the material we have on the Foundation, is appears that the basic criteria for invitation to apply for the endowment shifted over the years. In 2005, an email reflects that initially, the Foundation would consider institutes with at least 300 members for an endowment. They then raised the goal to 500 in 2005. Sometime between that email in 2005, and 2008, that goal was raised to 1,000 members for the initial $1 million dollar endowment. It is unclear what the expectation was in September of 2006, when the Yavapai College OLLI submitted the application for the first endowment. However, YC OLLI did report 1,072 unduplicated members in May of 2006.

In January of 2007 the Osher Foundation awarded Yavapai College a $50,000 “bridge grant” to assist in the transition of funding from the annual grants to the endowment. This was awarded as the endowment would not have had any time to collect interest at this point, and so there would be no interest to draw on for funding.

The annual report submitted in August of 2008 reflects the following unduplicated head counts:

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<td>2005-2006</td>
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<tr>
<td>2006-2007</td>
<td>1129</td>
<td>5.31% growth</td>
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<tr>
<td>2007-2008</td>
<td>1379</td>
<td>22.14% growth</td>
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The August 2008 annual report submitted to the Osher Foundation served as the “application” for the second million dollar endowment. In October of 2008 the Osher Foundation awarded YC OLLI a second $1 million dollar endowment based on “the continued progress of the program and the significant number of members it now serves.” (Letter from David Blazevich dated 10/22/2008.) In addition, the foundation gifted Yavapai College with a $25,000 grant in November of 2009, reflecting the difficulty of the economic downturn in the economy and its impact on endowment interest rates.