



APRIL 2024

Jean Youkers takes helm of OLLI-W Council

Fred Hosier

Remember your first experience with OLLI?

New OLLI Wilmington Council Chair Jean Youkers does, including her immediate desire to be part of the OLLI community. Before Jean retired, she was asked to be part of a panel at an OLLI class in Wilmington.

When she arrived at Arsht Hall, OLLI's Used Book Sale was going on. Classes and books! Jean decided then and there that, when she retired, she definitely was going to check out OLLI.

Jean took classes in several different areas, attended UD by the Sea, taught courses, was on an OLLI committee, then was elected to Council and became Executive Vice Chair. Now, Jean Youkers becomes OLLI Council Chair on April 1, 2024, for a one-year term. (Jean says being Executive Vice Chair for one year helps prepare the new Chair for their responsibilities.)

The more you know about Jean, the more this post-retirement progression makes sense.

Jean has written poetry, humor, short stories and two books. When she worked in marketing in the health care industry, writing was always a part

of her job. "I always liked to write," Jean says. So, Jean took OLLI writing courses, and eventually taught them, too. But her other interests, including music and drawing, drew her to other OLLI classes as well.

And when you speak with Jean, her enthusiasm for all things OLLI shines through. After retirement, Jean says "OLLI allowed me to pick up the things I love doing. And the more you get involved in OLLI, the more you want to know."



Maintain quality and expand

Jean says she's been inspired by the previous OLLI Wilmington Council Chair Glenn Rill. Jean says Glenn has emphasized doubling down on the things that OLLI does well in Delaware while expanding to new horizons. That's Jean's goal as well.

She's been happy to see some new OLLI developments that she wants to help maintain. Expanding OLLI classes to more modalities – Zoom classes along with sessions that are offered both in-person and online – has been a huge benefit, Jean says. Now, courses can be shared across New Castle,

(Continued on page 2)

Inside

OLLI-W Council Presents FY2025 Budget	p. 3-4
New Council Members	p. 5-6
Staff at Arsht Hall Adds Two New Faces	p. 7
Volunteer Spotlight: Glenn Rill	p. 8
OLLI Speakers Bureau	p. 9
My OLLI Legacy Story: Dr. Robert Hampel	p. 10-11
Were You a Lobbyist? I Heart UD Day	p. 12

(Continued from page 1)

Kent and Sussex County lines that wasn't possible before. "We've been brought together by Zoom," Jean says.

The return of food service at Arsht Hall, now provided by Chelsea Tavern, is another recent accomplishment she applauds.

Jean also wants to make sure two newer initiatives – the OLLI Speakers Bureau and January Explorations – continue and expand. (The Speakers Bureau offers one-time classes at area libraries to give people a taste of OLLI. Explorations is the two-week mini semester held in mid-January.) And to no one's surprise, Jean also wants the Used Book Sale to return to OLLI. (The book sales stopped during the pandemic.) Jean says she's seeking Book Sale Committee members, hoping to form that group soon. If all goes well, Jean would like to see a book sale this fall.

Making sure OLLI maximizes collaboration opportunities with the University of Delaware is another of her priorities. She'd like to encourage involvement of UD students in OLLI, too, via an OLLI Scholars program, creating an intergenerational focus, including OLLI participants mentoring younger people.

Jean also points to the importance of developing a new OLLI Wilmington Strategic Plan. Work on that began recently.

Jean would also like to boost how OLLI uses course evaluations from students. She'd like to find a way to collate the information that comes in from individual courses to help steer OLLI for the future.



Jean Youkers signing her books at Browseabout Books in Rehoboth.

Many of these goals work toward one central priority: Keeping OLLI's membership up.

Books, beach ... and more books

Jean was born in Western Pennsylvania near Pittsburgh. She moved to Delaware 37 years ago in 1987. Jean and her husband live in Hockessin. But if you're familiar with Jean's writing, you know that the beach, particularly Rehoboth, is one of her favorite places.

Jean's short stories have appeared in a number of beach-themed anthologies, such as *Beach Days* and *Beach Dreams*. She's published two books which follow four central characters who live in Rehoboth: *Lunch Bucket Lists* and *Interlude at Rehoboth*. "The characters are fictional, but they visit real places in Rehoboth," Jean says. Jean is considering another book which would be a collection of her short stories, including those published previously in the beach-themed books.

Recipe for success

Jean says a combination of factors helps make OLLI in Delaware successful. (Did you know we're the second largest OLLI in the U.S.?)

First of all, "We have a wonderful program," Jean says. "The staff is incredible and so helpful. And the value of our volunteer instructors – they are so qualified! I can barely decide what [courses] to take. They give so much of their time and expertise."

Jean also credits being part of the University of Delaware, the Arsht Hall building and its central location as ingredients for success, noting the number of OLLI students who come from Pennsylvania, New Jersey, and Maryland.

She also calls Karen Asenavage Loptes, director of UD OLLI who started in August, "a dynamo" who jumped right in as if she'd been a part of OLLI all along.

What would she say, one-on-one, to someone to encourage them to come to OLLI? "You'll have fun," Jean says. "All the hobbies you had in school ... now you'll have time and a place to explore them. It's my second childhood," Jean says.

Jean recalls having such a conversation about OLLI with a complete stranger while on an Amtrak train. The conversation worked. The fellow train passenger is now an enthusiastic student. Word-of-mouth is incredibly important to increasing OLLI membership, Jean says.

"I feel honored to work with the talented and enthusiastic OLLI-W Council members," Jean says. "I'm excited about the year ahead which promises exceptional course offerings, events, and new projects. I'm grateful to Council, staff, our dedicated instructors, and other volunteers who, working together, make OLLI ... in a word, wonderful!"

OLLI-W Council Presents FY2025 Budget

(July 1, 2024 — June 30, 2025)

Phil Weinberg, Council Finance Chair

Each Spring, the OLLI-W Council presents the approved budget for the next school year in the OLLI-W News in Wilmington newsletter. The next fiscal year (FY 2025) begins on July 1, 2024, and ends on June 30, 2025.

Overview

The last fiscal year was, like the past three years, much different than we had experienced in the years prior to the Covid-19 pandemic. Fortunately, this past year we had two successful semesters and the 2023 summer session. In the Fall and Spring, we continued to offer classes both online and in-person, and continued to add more hybrid classes each semester. Sharing classes (online and hybrid) with the Kent and Sussex County OLLI groups has benefitted members of both OLLI organizations.

FY 2025 vs. FY 2024

Budgets are usually developed in late Fall. This lead time requires some long-range predictions. Forecasting for FY 2025 has not been easy. However, we have finally prepared a budget that we think is workable and reflects our best thinking of what we expect for the coming year.

FY 2025

Revenues – Attendance and revenues are still significantly lower than prior to the pandemic. **To reach the pre-pandemic higher lev-**

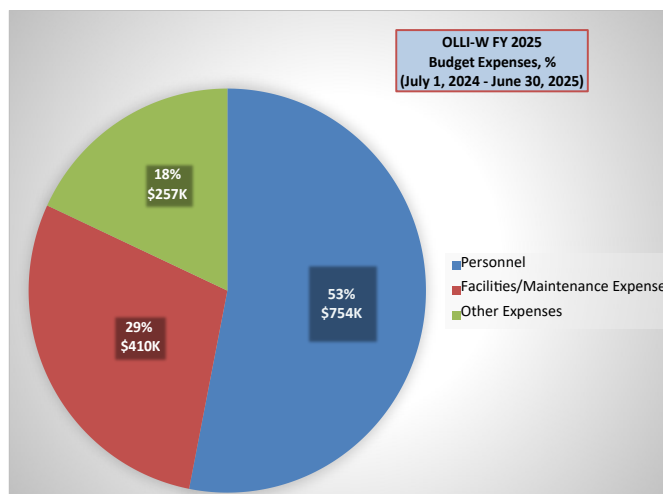
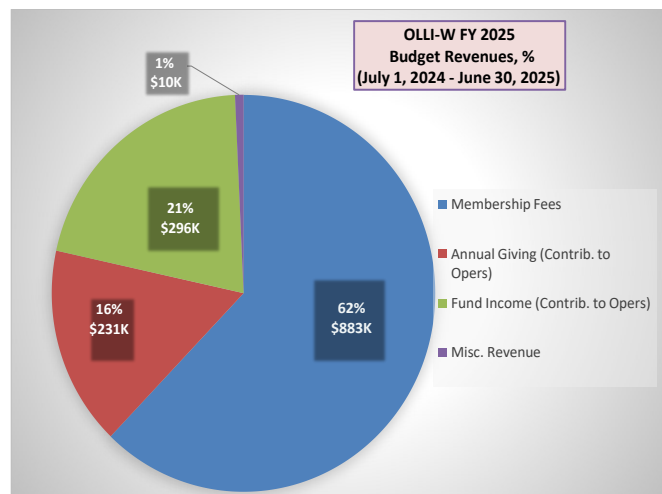
OLLI-W — FY2025 Budget (July 1, 2024—June 30, 2025)		
Approved by Council: Date—3/11/2024		
Revenue and Expense Summary		
Revenues		% of Total
Membership Fees	\$883,185	62.2%
Annual Giving (Contributed to Operations)	\$230,951	16.3%
Fund Income (Contributed to Operations)	\$296,154	20.9%
Miscellaneous Revenue	\$10,000	0.7%
Total Revenues	\$1,420,290	100%
Expenses		
Personnel	\$754,000	53.1%
Facilities/Maintenance Expense	\$409,570	28.8%
Other Expenses	\$256,720	18.1%
Total Expenses	\$1,420,290	100%
Surplus/(Deficit)	—	

els, we very much need our current members to encourage others to join and increase our enrollment, thereby maximizing the portion of our revenue that comes from membership fees. Despite inflationary pressures, we have decided to leave the enrollment fee of \$260/semester, the same as last year. In addition, anyone enrolling in the Fall for the full year will receive a discount of \$25.

Next year for OLLI-W, total fee-based revenues are estimated to be about \$883K, or about 62% of our total budget. Additional revenues

from all other sources are budgeted at \$537K (gift and scholarship funds -\$162K, other annual giving funds-\$69K, endowment income-\$296K, and miscellaneous-\$10K) resulting in total revenue of approximately \$1,420K. We should pause to note how fortunate we are to provide such a high portion of revenue coming from gifts and endowment income. However, we need more members, as we cannot assume that gifts and endowment income usage can continue forever to be available to balance our budget.

(Continued on Page 4)



(Continued from Page 3)

Expenses – Our major expense will be personnel (this is our wonderful UD office and technical staff). It is estimated to be \$754K, or about 53% of our budget. The next largest expense is for maintaining Arsht Hall and its surroundings. This includes custodial, snow removal, utilities, grounds, and maintenance expenses, etc., and is expected to cost about \$410K. Other expenses, among which are printing, credit

card, food, audio/visual equipment, office supplies, and miscellaneous others, are estimated to be \$257K.

Perspective

As mentioned in previous statements, our budget reflects the nature of our cooperative. Since our instructors are volunteers, their services do not constitute a budget expense. Once again, we should pause to note how fortunate we are at OLLI-W to attract many members

(but we need more) and to enjoy such a high portion of revenue coming from gifts and endowment income. Most comparable cooperatives have fewer members and depend almost solely on enrollment fees. We, on the other hand, partner with a major university, have our own building, offer a large number of courses, have a relatively large endowment, and enjoy the philanthropic support of most of our members. We are fortunate indeed.



Coming this fall Welcome to Delaware!

Tom Powderly

Delaware has a long, complex, and fascinating history with numerous sites of historic significance and many lesser known but intriguing places of interest spread across the state. A statewide group of OLLI members has been meeting for the past few months to develop a new online course tentatively titled "Welcome to Delaware: 10 Views of the First State," highlighting the wonders of our home state. Modeled after the successful "New York City: 10 Unique Views" class, now in its fourth semester, the new course will look at a broad range of subjects, historic and current, from across all three Delaware counties.

Starting this fall, subject to Curriculum Committee approval, each semester, 10 instructors will each present a Delaware-related topic of their choice based on their own interest and expertise. These topics can range

from history and culture, to commerce and government, to the environment and social issues. Notable Delawareans will also be included. Each class will be unique and will include time for discussion.

While the Fall '24 outline is still being finalized, topics are expected to include Early Delaware History, Delaware's National Historic Park, The Lightship Overfalls, A Walking Tour of Dover, Lafayette's Return to Delaware, New Castle County Architecture, and the Hotel du Pont.

It is expected that this will be an ongoing class, and OLLI members with a Delaware story to tell are invited to contact olli-online@udel.edu. It is also possible that guest speakers will be invited to make presentations. Suggestions are welcome. There is no doubt that the course will benefit from participation from across all three Delaware counties and be a popular addition to the OLLI catalogue.

New OLLI-W Council Members

Glenn Rill

On March 11, OLLI-Wilmington Council elected Jean Youkers as Council Chair and Rose Greer as Executive Vice Chair. In addition to their new roles on the Council both Jean and Rose are members of several committees and are valuable volunteers, always willing to donate their time.

At the same meeting, six

members were elected to serve on OLLI-Wilmington Council from 2024 to 2027. They are Hays Butler, Bob Blazovic, Alicia Celso, Peg Stanford, and Becky Varlas. Ruth Mayer was elected to a two-year term, filling the remaining two years of a vacant seat. Their photos and bios follow below.

We appreciate the efforts of the Nominating Committee, led

by Council person Linda Julius, to find us an impressive list of new Council members.

Many thanks go to the departing Council members who have completed their terms: Linda Julius, Rebecca Worley, Judy Diner, and Phil Weinberg. Their efforts have led OLLI-W through many challenges as we recovered from the pandemic.

Robert J. (Bob) Blazovic

Robert (Bob) Blazovic, BS in Mechanical Engineering, New Jersey Institute of Technology '85, joined OLLI in fall 2022. Bob retired after a 36-year career at DuPont and is married with two children and four grandchildren.



Bob volunteers with Ronald McDonald House Charities of Greater Delaware and is a Wilmington Hospital Emergency Department Ambassador. His charitable activities include service with the Knights of Columbus of Immaculate Heart of Mary Church and random DuPont "Days of Caring" (Emmanuel Dining Room, Habitat for Humanity, etc.).

At OLLI, he volunteers at the Wireless Helpdesk, during Eco Team Earth Day activities and as a hybrid operator/virtual assistant.

His hobbies and interests include home DIY projects and trap shooting as well as lifelong learning about subjects such as health and wellness, the environment and technology.

A. Hays Butler

A. Hays Butler has been a member of OLLI since 2016. He is a retired attorney who practiced law for 20 years, primarily in the field of energy regulation. He worked for the Federal Energy Regulatory Commission and as in-house counsel for several energy companies.

Subsequently, he was an Associate Professor and Academic Law Librarian at Rutgers Law School in Camden, N.J.



He has taught several courses at OLLI, including *International Human Rights Law*, *Landmark Civil Liberties Cases*, *The Supreme Court and American History*, and *Great Decisions*.

In addition to being on Council, he is currently a member of the Curriculum Committee and the Strategic Planning Committee.

Alicia Celso

Alicia was born in Louisville, Ky., and lived in California, Ohio, Florida, Pennsylvania, London, England and then went back to Pennsylvania.



She studied mathematics and became an actuary. She was fortunate to work in the international divisions of AIG and MetLife where she led global product development and chaired MetLife Europe boards. Her career took her on hundreds of trips to 60+ countries on every continent (except Antarctica) as well as living in London for six years. The most rewarding part of her career was working with teams across diverse cultures.

Alicia joined OLLI in 2020 after the perfect storm of moving back to the US from London, retiring and then the pandemic! OLLI was a bright beacon of light in the transition from a busy life filled with travel to the pan-

(Continued on page 6)

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demic isolation. Alicia was hooked on OLLI and went on to serve on the Fundraising Committee, where she is currently chair, as well as participating in the latest strategic planning initiative.

Alicia lives in Chadds Ford surrounded by nature. She is passionate about music – speakers in every room and outside! And she loves reading – belongs to three book clubs. She is a puzzle fanatic to feed her need to solve problems.

Ruth Anne Mayer

Ruth Anne Mayer has proudly attended OLLI since 2011. In 1991, she began her “rookie” year (age 42) at Christiana High School. She taught history, economics and AP government and was a class advisor twice.



After her retirement in 2011, she was accepted into the New Castle County Master Gardener program. She has also been a faithful volunteer at the Food Bank of Delaware. She's served in a variety of committees and leadership roles in both organizations. Today, she continues to serve on the board of the

Food Bank.

She is honored to be selected to serve on the OLLI-Wilmington Council. She has also volunteered on the OLLI hospitality committee, helped with the book sale and initiated a partnership of sorts with the Food Bank of Delaware.

She graduated from UD in 1970 with a B.A., political science. At Villanova University, she completed all work for a BSN, with the exception of her clinical work.

She is a passionate gardener and traveler. She loves reading, doing crossword puzzles, playing Scrabble, cooking, taking yoga and the companionship of her dog, Blake!

Peg Stanford

Peg Stanford is a native Delawarean and grew up in Newark, way back in the last century. UD was her choice for college, and she graduated with a Bachelor's degree in Health Sciences. She met her husband in college, and together survived raising two kids and numerous rescue dogs.



Her degree opened many doors in her career. She worked in various roles over the years: lab tech in a private lab, R&D (had way too much personality to be successful), customer support for HIV blood donor screening test, sales of laboratory instruments into hospital laboratories, business operations and, finally, data analyst, retiring from Siemens Healthcare Diagnostics in December 2019.

Hospitals felt like a second home to her, so she volunteered at ChristianaCare for a few years, performing newborn hearing screenings. She was also a Girl Scout cookie mom and a dog walker at a pet shelter.

She joined OLLI in February 2020. Her husband cooks dinner every night and it does not seem to keep him busy enough, so he joined OLLI too. She works the reception desk on Thursdays and is a co-instructor for the Current Issues class.

Becky Varlas

Prior to joining OLLI in spring 2013, Becky spent 37 years in education – four years as a teacher followed by 33 years as a school counselor (22 in middle school and 11 in high school).



She has volunteered at the Food Bank of Delaware, the Newark Area Welfare Committee Food Pantry and Hope Dining Room. She chairs the Social Justice Committee at the Unitarian Universalist Society of Mill Creek and is a member of the Unitarian Universalist Delaware Advocacy Network.

She has taught OLLI courses in storytelling and activism, and assisted with Yesterday for Tomorrow. She currently teaches Cartooning each fall and Solid Gold Singers each spring. She has led the Solid Gold Singers in performances at the Kutz Home, the Hockessin Library and an AARP luncheon.

She serves on the Bulletin Board and Open House committees and has presented at local libraries as part of the Speakers Bureau. In the past year, she was secretary of the Council and the Curriculum Committee.

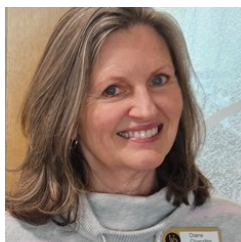
She earned a B.S. in Journalism and an M.A. in Counseling at West Virginia University and enjoys music, art, travel, reading, water volleyball, aqua fitness and time with family and friends.

Staff at Arsht Hall Adds Two New Faces

Fred Hosier

Meet Diane Chandler

If you visit Arsht Hall on Fridays, you may meet a new OLLI employee at the desk outside the administrative offices.



Diane Chandler started with OLLI in January. She is the administrative assistant on Fridays and will fill in on other days as needed. "I'm the Friday Gretchen," Diane says, performing office support functions that Gretchen Sailer does the rest of the week.

Diane is also working in the library at Arsht Hall, organizing materials for OLLI instructors and helping the Eco Team catalog their books (both of which are available to sign out by OLLI members).

Registration and special event days are also times when you'll see Diane helping in Arsht Hall.

Originally from Endicott, N.Y., Diane has lived in Wilmington since 1988. Her bachelor's degree is in Interior Design from West Virginia University, and she has a master's in education from Wilmington University.

Diane previously worked for Junior Achievement, the Epilepsy Foundation and at the University of Delaware School of Education as a Methods Field Supervisor. She was also a second- and third-grade teacher in the Brandywine School District. "I love the idea of staying in something that's education-based," Diane says about working at OLLI.

The best thing about working at OLLI for Diane? "The students and all the amazing, helpful, kind people I work with," she says.

Diane enjoys reading and podcasts, and takes exercise classes at the Y. She is also a deacon at Westminster Presbyterian Church.

"I'm grateful to be here and be part of the team," Diane says.



Meet Tom Wentz

When you arrive at Arsht Hall, the first OLLI employee you will see each day is Tom Wentz, in uniform, in the parking lot.

Tom is a new security employee for the University of Delaware, working both outside and inside Arsht Hall. He started when the Spring semester got underway in February and is at Arsht Hall Mondays through Fridays from 7:45 a.m. to 4:15 p.m.

Previously a sheriff in Maricopa County, Arizona, Tom now lives in New Jersey. His hobbies are mainly focused on outside activities, among which he includes fishing, hiking and mountain biking.

Tom performs all sorts of security duties, indoors and outdoors, around the Arsht Hall campus. For example, when he was interviewed for this profile, he was checking the blue emergency phones in the parking lots.

But anyone who has met Tom outside Arsht Hall will know that one of the favorite parts of his new job is helping OLLI students make the crossing safely from the parking lots into Arsht Hall – and engaging them in conversation while helping them across the street on busy class days.

OLLI participants have "a lot of knowledge," Tom notes. "It's nice to hear their stories," he says, as they are making their way into the building.

Tom says the students and staff at Arsht Hall are the best he has worked with.

And OLLI participants can readily acknowledge that Tom's attention to their safety amid traffic and wet or icy conditions, and a helping hand to open doors, adds greatly to their welcoming at Arsht Hall.

Volunteer Spotlight

Jean Youkers

Glenn Rill

Glenn Rill, OLLI-W Council Chair 2023-24, was born and grew up in Maryland. He earned a B.S. in Mathematics and M.S. in Computer Science at the University of Maryland. Glenn retired after a 30-year career at DuPont and Accenture, then continued to share his knowledge as a high school math teacher in New Jersey.

Inspired by his grandfather, who had been a high school math teacher as well as a school principal, Glenn developed an interest in both teaching and learning, which has continued. When he joined OLLI-W 14 years ago, "I pulled my old guitar out of the closet and got involved," Glenn says.

Since that time, he's led guitar classes plus many classes on the history of various musical genres— protest songs of the Great Depression and labor movement, folk music, country, blues, and doo-wop. He also taught "Sing Through the 2020 Election" and is planning an updated course called "Sing Through the 2024 Election" for Fall Semester, which covers the politics of every presidential election since Washington and into the upcoming election, and how the politics is expressed in campaign songs and music.

Glenn likes the research involved in developing new courses. He and his co-instructors lead the Friday "Guitar Music Jam" and "Easy Guitar – Play for Joy" classes. He also serves as co-chair of the Music Committee.



When not taking and teaching classes at OLLI-W, Glenn regularly plays golf and tennis. He and his wife, Suzanne Souder, both "love cooking and eating what we cook." Suzanne is Council President of the City of New Castle. A love of travel has taken them to destinations including France, Italy, Scotland, Canada, and India – England will be next – plus all over the U.S. from Hawaii to California and the Southwest to the entire East Coast – frequently at Lewes and Rehoboth Beach. Glenn has two daughters and three grandchildren.

Asked what he likes most about teaching and volunteering at OLLI-W, Glenn says, "I get a great feeling of accomplishment and satisfaction when students enjoy our classes. OLLI-W is a wonderful place to be, but it will continue and grow only if we students step forward and get involved by bringing our talents to teaching, serving on committees, and joining leadership. We have an outstanding staff, but they cannot do it alone. Students must participate."

Over his past three years on OLLI-W Council, Glenn has been a wonderful influence on the operation with his thoughtful and thorough approach and leadership. "He's been supportive to everyone, listens to their input, and readily tackles any challenges as we continue to recover from the pandemic and grow in many new directions," says one Council member.

Thank you, Glenn, for all you have done and continue to do for OLLI.

What Do 15 Instructors and Four Performance Groups Have in Common?

Marty Cohen, Linda Kellogg, and Jean Youkers

Since January 2023, they have combined to represent OLLI at 39 public events and are the face of OLLI's Speakers Bureau.

The Speakers Bureau is a community outreach program for education and promotion of OLLI membership. The programs have been held at five New Castle County libraries and two retirement communities with promotion through online event calendars, social media, and in-house posters.

So far, 713 have attended with six more programs to come this spring.

Programs are scheduled at a time convenient for OLLI instructors and the host, lasting 60 to 75 minutes. To date, subjects have included Birding, Broadway, Health, History, Literature and Song.

Please consider joining this dynamic group as a presenter or supporter.

Thank you to our current Speakers Bureau instructors:

Donna Avile	Paul Beckman	Bebe Coker
Bob Ehrlich	Judy Filipkowski	Rose Greer
Lloyd Maier	Tom Powderly	Hisham Sherif
Claire Sullivan	Becky Varlas	Mike Walsh
Becky Worley	Jean Youkers	Bob Zola

Flute Choir (Pam Fink & Margaret Love)

Guitar Trio (Andrew Levin)

It's Never Too Late (Glenn Rill)

Solid Gold Singers (Becky Varlas)

For more information: Contact Marty Cohen (martinacohen@aol.com).

Ralph Begleiter at Over 100*

Robert Ehrlich

*That is over 100 countries that Ralph Begleiter has worked in.

This semester Ralph taught a class on the promise and perils of "Artificial Intelligence and the News Media." He showed how the proper prompts can produce a perfectly artificial story of the perfectly artificial magenta penguin as discovered in the Arctic. Ralph's work included taking UD students to Antarctica where he undoubtedly encountered



A.I. penguin

real penguins. His earlier trips as a radio and TV reporter were the subject of "Adventures of a Global Journalist," a five-week class offered at OLLI in fall 2021.

On May 8, Ralph will summarize his visits to locations around the

world and encounters with high level officials in a talk, "Adventures of a Global Journalist" at the Kutz Senior Living Center Donor Luncheon at Harry's Savoy Grill in north Wilmington. He will also be a speaker at UD by the Sea.

Sylvia Wagman, member of OLLI and the Kutz Senior Center Auxiliary, wrote an article on Ralph's journeys and teaching for the March 2024 issue of *Jewish Living Delaware*.

MY OLLI Legacy Story: Dr. Robert Hampel

Megan Cantalupo, Office of Development & Alumni Relations, UD

Like many others, UD *professor emeritus* Robert Hampel first heard of OLLI from a friend who was taking classes. Encouraged by her recommendation, he attended a lecture on WWI taught by fellow UD *professor emeritus* Ray Callahan. “That’s how I learned where the phrase ‘hold your horses’ originated,” Bob recalled with a smile. Because he was teaching full-time, advising doctoral students, and writing a book, he wasn’t ready to immerse himself in OLLI.

In 2022, Bob’s final sabbatical preceded retirement, and he quickly realized he missed the classroom. “I was asked to teach a freshman honors colloquium at UD – something I’d enjoyed three times – but I preferred a different experience, a different type of teaching.” He chose OLLI where classes meet once a week for 75 minutes with no tests, papers, or grades. “I didn’t want to feel over-extended in retirement and I didn’t want to feel idle. It’s harder than I imagined to find that middle ground.”

Last year, Bob embarked on a second act of his teaching career with his first OLLI course, “American Colleges, 1636-2023,” a revised portion of the large undergraduate “History of Education in America” class he taught at UD.

From the start he was impressed by his OLLI students’ insightful comments and questions. “They brought so much to each class discussion,” Bob said. “For



example, they wondered why college is so expensive today. They had hunches but weren’t sure. So we revised the syllabus to devote one session to that important topic.”

His spring 2024 course, “Norman Rockwell to Evelyn Wood: Shortcuts in American Education,” will explore 20th century strategies to make learning faster and easier. The five-session class stems from his 2017 book on a vast topic spanning correspondence schools, CliffsNotes, Classical Comics, shorthand, speed reading, paint by number kits, three-year colleges, evening law schools, and other ways to save time and energy.

In addition to his roles as OLLI student (he also takes classes) and instructor this semester, Bob joined Wilmington’s very active fundraising committee, which strategizes and promotes ways to support OLLI. He is also working with OLLI leadership to encourage instructors to include multiple opportunities for students to talk, not just listen, during each class.

After one full year of teaching, Bob’s passion for education now benefits a brand-new group of learners and in turn, it’s making an impression on him.

“Discussions are very lively. Students are not bashful. Their enthusiasm and how they express gratitude is rewarding. They even clap at the end of a class they enjoy, an old custom I think undergraduates today overlook.” He also praised the support staff who are always there to assist the instructors and make things run smoothly.

The more involved Bob became with the program, the more he witnessed OLLI’s need for philanthropic support. “It’s a lean budget,” he noted. “More endowment income can make a difference for the extras that matter.”

With that in mind and knowing about the change in federal tax law making it possible to use an individual retirement account (IRA) to fund a charitable gift annuity (CGA), Bob contacted UD’s Office of Gift Planning. He directed his 2023 mandatory distribution from an IRA into a CGA, which will yield income to him during his lifetime. When the annuity matures, the remainder will support OLLI. “This is a very attractive change in our tax code. You will receive more each year than you would earn from a CD, money market account, or A-rated bonds. And it’s not a complicated

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transaction— the paperwork was simple.”

Bob urges others who have been considering this kind of gift to take advantage of the one-time charitable rollover opportunity. “Keep in mind that we have several thousand OLLI members. These classes can be an important part of each week, particularly for folks who are retired. Instructors are all

volunteers. It’s not lavishly endowed, so every dollar helps.”

To learn more about how you can use funds from your IRA to create a CGA that creates a revenue stream for you AND helps OLLI, [read the article below](#) by Beth Harper Briglia, another OLLI instructor and a philanthropic advisor. You can also learn more at [https://giftplanning.udel.edu/giving-options/gifts-generate-](https://giftplanning.udel.edu/giving-options/gifts-generate-income/ira-charitable-rollover-gift-annuity-plan)

[income/ira-charitable-rollover-gift-annuity-plan](#).

Dr. Robert Hampel is a professor emeritus in the School of Education at the University of Delaware and an award-winning historian of education who also studies contemporary educational policy. He is the author/editor of six books and 65 articles. He has also been a Public Service Fellow for former Delaware Governor Mike Castle, a trustee of the Sanford School, and interim director of UD’s School of Education.

Charitable Gift Planning:

What Are Charitable Gift Annuities and Why Should You Care?

Beth Harper Briglia, Philanthropic Advisor and OLLI Instructor

The popular phrase to “have your cake and eat it too” is generally used when referring to a situation which is a “win-win” for all involved. As a philanthropic consultant, I often use this phrase to refer to the benefits of a Charitable Gift Annuity (CGA) for the donor and the charity supported. Given the recent changes in tax law regarding qualified charitable distributions (QCD) from an IRA, coupled with an interest rate environment favorable to those of a certain age who are establishing CGAs, the use of a CGA to provide a steady stream of life-time income and to benefit a favored charity is a charitable option to consider.

Let us first address the basics. A CGA is a charitable vehicle which, when funded, provides fixed payments for life to a designated person or persons. The donor receives an immediate tax deduction for a portion of their gift, and a portion of the annuity payment is tax-free during the term of the contract. Annuity payments can be immediately activated or deferred at the donor/annuitant’s option. At the end of life of the designated beneficiary/s, a charity receives the remainder balance in the contract. An irrevocable contract is established at the inception of the gift, and the gift annuity payments are the legal obligation of the charity benefitted. Gift annuity rates can vary from charity to charity but are primarily based on a donor/s’ age at the start of the annuity contract. The January 1, 2024, CGA rates recommended by the American Council on Gift Annuities for a single life can range from 5.7% if you are 65 to a high of 10.1% if you are 90 years or older. A CGA

may be the charitable vehicle which best meets your lifestyle and philanthropic interests.

Consider the following:

Gifts of cash or securities can be used to fund CGAs. A gift of appreciated securities can reduce or eliminate capital gains tax.

In 2023, the IRS expanded the definition of Qualified Charitable Distributions (QCD) from qualified retirement plans to include one-time distributions to create life income plans, such as charitable gift annuities (CGAs). In 2024, if you are 70 ½ or older, you can use a QCD to fund a CGA with a one-lifetime maximum transfer of \$53,000. The \$53,000 counts toward the overall \$100,000 QCD maximum annual limit. All payments from a CGA funded by the QCD must be fully taxable at the recipient’s ordinary income tax rate.

Please consult with your legal, tax and financial advisors as your specific situation may differ from these basic considerations. The information provided in this article is not intended to replace advice from these experts.

If you are interested in donating to a favored charity but would also like to benefit from a steady stream of income during your lifetime, a CGA may be right for you. Please contact Nathana Jackson, UD’s senior director of gift planning, at 302-831-6093 or ndlane@udel.edu to find out more about CGAs and how they can benefit you and UD’s OLLI.

Were You a Lobbyist?

Bob Hampel, Fundraising Committee

Have you noticed the new motorized shades in the lobby of Arsht Hall?

Have you seen the two new LCD screens there?

Thanks to 279 donors last May, we bought those items from your gifts.

The 2023 I Heart UD Day was a great success. We raised \$49,000, with your donations ranging from five dollars to five figures. Your participation in the crucial “power hours” and “challenge grants” were especially helpful.

Let’s see if we can match those numbers again in 2024! Several emails in April will have reminders and updates for I Heart UD Day on May 1.

The goal this year is to raise more than \$40,000 to fund critical needs: upgraded technology to support both in-person and online classes and more comfortable chairs for some of our OLLI classrooms.



Motorized shades in the lobby of Arsht Hall and two new LCD screens were funded by donors during last year’s I Heart UD Day.

Photos by Steve Kellogg

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Submit articles to rehlich@udel.edu.

OLLI 2024 SCHEDULE

OLLI Kent/Sussex in person and OLLI Online

Feb. 5 – April 26, 11-week session

April 1 – May 3, 2nd 5-week session

OLLI Wilmington in person

Feb. 5 – May 10, 13-week session

UD by the Sea (Rehoboth Beach)

May 21 – May 24

Summer session

June 18-July 25 (classes held on Tuesdays,

Wednesdays and Thursdays. There will be no classes offered June 19 and the week of July 1)

Fall semester will start on Tuesday, Sept. 3