



HISTORY OF WELLESLEY-WESTON LIFETIME LEARNING

By E. Bruce Belason



I. INTRODUCTION

In the 20th century many changes occurred in America, including increased average life span from the mid-40s to the late-70s, increased level of education (especially the G.I. Bill), and introduction of Social Security and pension plans. A new class of citizens arose: retirees with economic security, health, time, and the inclination to pursue further education.

In 1976 Wellesley-Weston Lifetime Learning (WWLL) was formed to provide non-credit educational courses for senior citizens. The current academic year of 2015-16 is WWLL's 40th consecutive year.

Casual research indicates WWLL was one of the earliest Lifetime/Lifelong Learning (LL) organizations in the U.S. Today there are reported to be over 500 LL organizations in America¹ offering non-credit courses to an estimated 300-400,000 senior citizens². Almost all of the LLs are affiliated with institutions of higher learning, whereas WWLL began as an independent organization and retains that status. Thus WWLL seems to have a unique position as an independent pioneer in the American LL community.

Other unique aspects of WWLL are that it does not limit or screen membership in any way, and it has always been an all-volunteer organization, never having had a paid administrator or staff. Tables 1, 2, and 3 list the approximately 60 officers and directors, 100 teachers, and 50 other important contributors that have been identified who have served WWLL during its 40 years³.

II. BRIEF HISTORY OF LIFETIME LEARNING IN THE UNITED STATES

The concept for LL appears to have evolved in Western Europe in the mid-1950s. It evolved to be called the University of the Third Age: U3A, which has also become established on other continents⁴. In America, the LL movement appears to have begun in 1962 at The New School, a university in New York City. It was called the Institute for Retired Professionals (IRP) and is still thriving there.

In 1975-76, America celebrated the 200th anniversary of its Revolution. Coincidentally these years were also a revolutionary time for LL and related activities in America:

- In 1975, Elderhostel (now named Road Scholar) was formed, offering a wide range of world-wide educationally-themed travel experiences.
- In the Fall of 1976 WWLL began classes.
- In 1976, the Fromm Institute for Lifelong Learning began at the University of San Francisco.
- In the Spring of 1977, the Harvard Institute of Learning in Retirement (HILR) began.
- In 1977, the Osher Foundation was formed by philanthropist Bernard Osher of Maine, with a major goal of supporting higher education. In 2001 Osher began a major thrust in LL, funding enhanced efforts at the Fromm Institute and an activity at the University of Southern Maine. Next Osher offered seed and endowment funds, and organization-building expertise, to other interested institutions, resulting today in 119 chapters in all 50 States called "OLLIES", including locally at Brandeis.

¹From the website: www.newschool.edu/institute-for-retired-professionals.

²Private email from Road Scholar's Vice President Peter Spiers to WWLL Director Fran Weisse

³The names for 1976-1996 came from WWLL's 20th anniversary pamphlet (probably written by WWLL secretary Frances Dalton). The names for 1996-2016 came from brochures available from 2005-2016) plus a list of teachers dated 2005. No brochures from 1996-2005 were found. Thus some names are unfortunately missing.

⁴From *HILR in a Global Context* by Michael Shinagel, an article in *HILR* at 35, published in 2012.

- In 1977, the Austin Texas LL Institute was formed, helped by a charter for its first 2 years from the AARP⁵. The Austin LLI appears to still be an all-volunteer organization with very low fees and independent from an institution of higher learning—i.e. very similar to WWLL.

III. HISTORY OF WWLL

In 1976, William Greene, an English professor at MIT from 1925 through 1976⁶, and his wife Harriet, proposed formation of WWLL “patterned after an activity which they had enjoyed”⁷. This mystery “activity” remains undefined.

The Greenes sought an organization to help sponsor WWLL and provide necessary clerical, communication, and other support services. They connected with the Retired Senior Volunteer Program (RSVP) in Newton which had a related interest and was under the umbrella of Newton Community Services (NCS). The chairman of the RSVP Advisory Committee, Mr. Charles Thomas, became the first president of WWLL (the title then was Chairman of the Steering Committee). From 1993-2016 the director at RSVP (later renamed SOAR 55) was Jan Latorre-Stiller.

The 1976 Steering Committee made decisions which largely exist to this day, indicative of their soundness: ⁸

- Classroom space was rented at the Wellesley Unitarian Church.
- Courses were taught by retired college and high school teachers. This criterion was later relaxed.
- Courses were open to residents of all communities.
- WWLL was an all-volunteer program with an informal environment and no written bylaws.
- There was a strong emphasis on maintaining a low fee for registrants.
- Courses were held at two time periods on Monday mornings for 10 weeks each Fall and Spring.
- The importance of the social aspect was recognized with a coffee break between classes.
- There was an annual appreciation luncheon for the teachers, directors, and other key personnel. In 2007 this was named the Frances Dalton Appreciation Luncheon in honor of her long service.
- The church’s custodian set up the presentation aids equipment and prepared the classrooms. The custodian since 1993 has been the invaluable Fernando Cristancho.

Mr. Thomas served as Chairman for 12 years. His successor was Bradford Bachrach, who passed away after 2 years. He was succeeded by Charles Wakefield, who served 16 years, 1990-2006.

Unfortunately limited information survives about other officers during this period. Mary Tolles was treasurer for a number of years, and Frances Dalton served as secretary from about 1980 until 2006.

WWLL appears to have functioned smoothly during its first 30 years. However the years 2006 -2012 were somewhat tumultuous and saw many overlapping changes.

- From Nov. 2005 to May 2006, there was a complete turnover of WWLL’s officers. Sixteen-year chairman/president Charles Wakefield retired (but remained on the Board), as did ~25-year secretary (and refreshment team leader) Frances Dalton. They were replaced by long-time teacher John Podger as president, Bruce Belason as secretary, and Nancy Foilb as refreshment team leader. Ken Slowman replaced Nancy Perry as treasurer.
- In Jan. 2006, an administrative change within Newton Community Services (NCS) presented WWLL with a crucial decision: either WWLL had to yield its financial independence to continue to operate under NCS’s umbrella, or WWLL had to establish itself as a registered 501(c)(3) non-profit organization. WWLL chose the latter, led by presidents Charles Wakefield and John Podger. Charles obtained the pro bono services of Wellesley attorney Eleanor Uddo to do the legal work. Long-time teacher and director Pat Richard drafted the required bylaws. WWLL was able to continue to purchase secretarial-administrative services from NCS’s SOAR 55 subsidiary in the person of Rachel Mason.

⁵The Austin LLI’s AARP charter was #52. No more information on the AARP charter approach was found.

⁶ From Mr. Greene’s Feb. 1991 obituary in the *Wellesley Townsman*, researched by WWLL Director Jill Strang

⁷From the WWLL 20th Anniversary pamphlet.

⁸ From informal history of WWLL’s first 10 years, written by first President Charles Thomas

- In 2007-2008, WWLL began to enter the digital age. Stan Treitman, a volunteer data analyst for SOAR 55, applied his talents directly to WWLL and compiled email lists of registrants, by class, which gave the ability to send email blasts⁹. Stan's technical knowledge also led directly to WWLL's use of digital projectors. In 2007 WWLL established its website (expertly designed by contractor Michael Jordan who also took over design of the brochure WWLL publishes each semester).
- In 2009-10 there was another change in WWLL officers. John Podger resigned due to health, and Bruce Belason became president. Peter Hansen became secretary. May Persson became refreshment team leader.
- In 2008-2012 a developing financial problem came to a head. WWLL's financial balance became dangerously low. Wildly popular current events teacher Jerry Grossman¹⁰ retired due to health. Many other long-term teachers also retired: John Podger and Dieter Koch-Weser: science and history; Bob Fitzwilliam, Latin; Jack Lovewell: French; Lillian Broderick: Writing Your Story; Phyllis Mays: DeMystifying Computers; Renate Olsen: German. The financial problem was gradually successfully addressed over the years in multiple ways:
 - ◇ New teachers were gradually recruited, notably: Pat Herlinger: Writing Your Story; Frank Villa: Science in the News; Helen Sagan: Opera; Shig Kondo: After the War (predecessor to today's American Issues organized by Jill Strang and Ann Dolbear); Greater Boston Cultural Institutions; Tom Doran's history of Jazz and Rock & Roll; Ute Smith: German, and Steve Lowe's Constitutional Politics. At the end of 2012, the Newton LL lost its space, and several of their teachers came to WWLL: Helen Smith: Literature; Chuck Kamar: Poetry; Norm Gaudet: French; Tom Leonard: Music; and Gerry Weisenberg: Literature. A noteworthy 20-plus year constant: Lois Ziegelman's literature course.
 - ◇ Course fees were raised in steps: one class: from \$25 to 40, and 2 classes: From \$ 35 to 65. These fees are still less than half of any other local LL we are aware of.
 - ◇ Treasurer Ken Slowman led an effort to reduce expenses. We reluctantly ceased purchasing services from SOAR 55, the treasurer and directors taking on added duties. We contracted directly with Rachel Mason (who retired from SOAR) to prepare the draft of the brochure. We ceased bulk mailing of brochures to seniors in Wellesley and Weston. The Wellesley Council on Aging, led by Gayle Thieme, agreed to insert the WWLL brochure into their bi-monthly Newsletter (with WWLL paying any increased costs).
- Since 2012 financial stability and enrollment have stabilized. There have been several key personnel changes, however. Treasurer Ken Slowman had to resign due to health. Stan Treitman replaced him and has computerized the finances. Rachel Mason retired fully and Helen Smith now prepares the draft of the brochure for Michael Jordan's design. A Publicity Committee was formed. Unfortunately Charles Wakefield, Frances Dalton, and Jerry Grossman passed away.

⁹Interestingly, in 2008 about 50% of WWLL registrants had email capability. In 2016 is about 96%.

¹⁰In Presidential election years his class exceeded 300

IV. ADDITIONAL COMMENTS

While researching WWLL's history, several interesting things were learned that are worth sharing.

- The socialization aspect of LL is universally valued as important as the educational aspect.
- A fascinating book, *Master Class*, was written by Peter Spiers, a Senior Vice President of Road Scholar. He researched and analyzed the factors he concludes are common with active, happy, healthy retirees. He identified four: socializing, physical movement, creating, and thinking. These four result in a "Master's Way of Life (which) equals Happiness, Health, and an Optimistic Outlook plus Brain Health" (the "gorilla in the room"). Spiers numerically rates 31 specific activities most common to the Master's Way of Life-- participating in an LL is one of the 31¹¹.
- We visited the Harvard Institute for Learning in Retirement (HILR), hosted graciously by Steve Leon. Leon cited administrative challenges HILR has faced: parking, appropriate classroom space, handicap accessibility, finding course leaders, proper presentation aids equipment (including microphones for the speaker and audience), including providing rapid technical assistance in case of equipment malfunction. Note the similarity to the problems WWLL faces!
- Perusing the curricula offered by other LLs corroborates WWLL's experience in the favorite courses of LL students: current events is clearly the leader, followed by the arts, writing your story/memoir, history, and languages.
- John Podger, a subsequent Fox Hill resident, made an interesting observation. Jerry Grossman gave his current events lectures there too. John felt the Q&A sessions for Grossman at WWLL were more lively and perceptive than at Fox Hill. Since Fox Hill has intelligent residents, we theorized the reasons for the difference were (1) the captive nature of the audience at Fox Hill vs the WWLL audience that made a deliberate effort to attend, and (2) the WWLL audience largely was living in the "real" world vs the more sheltered life of a retirement community.
- In the vein of the Item above, another anecdote. We cope with limited parking at WWLL. For the Fall 2015 semester the church's parking lot was closed for repairs. The situation was explained to the 200 WWLL registrants. There were zero complaints. I spoke to at least 20 of the WWLL registrants. Their attitude was unanimously cheerful and "can do": increased parking challenge wasn't going to detract from their pleasure of attending classes!

¹¹ From P.62 and the Appendix of *Master Class* by Peter Spiers, published in 2012 by Center Street

TABLE 1: WWLL DIRECTORS & OFFICERS

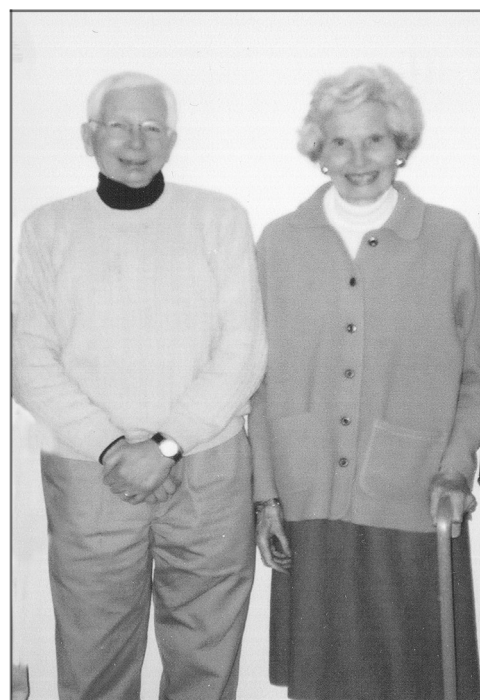
PRESIDENT	SECRETARY	TREASURER
1976-1988: Charles Thomas	1976-~1980:?	1976-?: ?
1988-1990: Bradford Bachrach	-	?-?: Mary Tolles
1990-2006: Charles Wakefield	~1980-2006: Frances Dalton	?-2005: Nancy Perry
2006-2009: John Podger	2006-2009: Bruce Belason	2005-2011: Ken Slowman
2009-2016: Bruce Belason	2009-2016: Peter Hansen	2011-2016: Stan Treitman

DIRECTORS: 1976-1996

Arthur Birkett Jr.
Mary Bowins
Ann Charlesworth
Barbara Clough
Richard Douglas
Bill Dyson
Constance Edwards
Annette Emerson
James Fenn
Robert Fitzwilliam
Betty Ginzler
Harriet Greene
William Greene
Betty Greer
Marjorie Harnish
Lois Harris
George Hotchkiss
Barbara Ireland
Jan Latorre
Polly Lyman
Frances Marshall
John Podger
Alice Riley
Carolyn Scott
Gail Stern
Chester Williams

DIRECTORS: 1996-2016

Cliff Baden
Ann Dolbear
Bill Dyson
Annette Emerson
Robert Fitzwilliam
Nancy Foilb
Jay Kaplan
Jan Latorre-Spiller
Jack Lovewell
Helen Luddy
May Persson
Nancy Peters
Alice Robinson
Jack Rubin
Marian Stevens
Jill Strang
Sue Taylor
Fran Weisse
Joe Weisse



Former Directors
Charles Wakefield and Frances
Dalton

TABLE 2: WWLL TEACHERS

1976-1996	1976-1996 cont'd.	1997-2016	1997-2016 contd.
Walter Abbott,S.J.*	Miriam Meyer	Walter Abbott, S.J.*	Mark Hopkins
Herbert Abraham	Lucetta Mowry	Bruce Belason	Tom Leonard
D. Harry Angney	John Podger**	Scott Birney	Dorothy Litt
Joseph Alexander	Patrick Quinn	Mary Black	Kyoko Kondo
Joseph Andrew	Shirley Reiss	Richard Bradley**	Shigeo Kondo
Richard Bradley**	Adrienne Richard**	Lillian Broderick**	Jack Lovewell**
Robert Campbell	Helen Roca-Garcia	William Burke	Steve Lowe
Barbara Clough	Justine Ruiz-de-Conde	Dave Caruso	Henry Lukas
Wilbury Crockett	Irwin Sanders	Adolfo Caso	Phyllis Mays*
Miriam Dickey	Edwin Steffek	Leonard Casper	Dave Meyersmith
Richard Douglas	Charles Taylor	Ann Dolbear	Wendy Meyersmith
Doris Eyges	Charles Thomas*	Tom Doran	Max Michelson
Robert Fitzwilliam**	Edward Wagenknecht	P. Albert Duhamel	Renate Olsen*
Teresa Frisch	Robert Walker	Richard Frankel	John Podger**
Kathy Graves*	Edward Williams	Mo Freedman	Iver Ravin
William Greene	Chester Williams	Robert Fitzwilliam**	Adrienne Richard**
Jerome Grossman**	Theodore Wood Jr.	Philip Gates	Alice Robinson
William Guernsey	Roberta Wood	Norman Gaudet	Mike Rosenberg
Janet Guernsey		Jerome Grossman**	Helen Sagan
Charles Henderson*		Kathy Graves*	Michael Schreiber
Alice Jones		Phil Jutras	Susan Schulman
Dieter Koch-Weser**		Charles Henderson*	Helen Smith
Katherine Lever		Pat Herlinger*	Ute Smith
Marie Lewis		Golda Kagan	Barbara Snow
Daniel Linehan,S.J.		Chuck Kamar	Elaine Storella
Jack Lovewell**		Jack Hunter	Jill Strang
		Ruth Jacobs	Robert Trifiletti
		Dieter Koch-Weser**	Frank Villa*
		Ray Rever	Gerry Weisenberg
			Lois Ziegelman**

NOTES

*Taught 10+ years

**Taught 20+ years

TABLE 3: OTHER CONTRIBUTORS

<u>COURSE CO-ORDINATORS</u>	<u>REFRESHMENT TEAM</u>	<u>OTHER CONTRIBUTORS</u>
Manny Abrams	<u>LEADERS</u>	<u>VIDEOGRAPHERS</u>
Ross Atkin	~1980-2006: Frances Dalton	Shigeo Kondo
Bruce Belason	2006-2009: Nancy Foilb	Mas Nakashima
Bob Harris	2010-2016: May Persson	Bill Stanwood
Phil Jutras	<u>MEMBERS</u>	Mary Ann Mooradian
Jay Kaplan	Ross Atkin	<u>EQUIPMENT SET-UP</u>
Louise Leger	Katherine Ebert	Bill Dyson
Eileen Mitchell	Dorothy Ellis	Stan Treitman
Wally Nadel	Betsey Falsey	
Shirley Quinn	Anna Flenchbaugh	<u>CLASSROOM SET-UP</u>
Jack Rubin	Linda Foo	Emerico
Inge Reinhard	Marie Gessenheimer	Fernando Cristancho
Naomi Schmidt	Bobbie Hansen	
Susan Taylor	Adele Hoffman	<u>ADMINISTRATIVE SERVICES</u>
Stan Treitman	Susan Kaplan	Rachel Mason
Robert Visco	Jay Kaplan	Helen Smith
Fran Weisse	Joann Potter	<u>BROCHURE PRINTING</u>
Joe Weisse	Pat Richard	Ben Chow, Vantage Graphics
	Jack Rubin	
	Renee Rubin	
	Betty Shea	<u>WEBSITE & BROCHURE DESIGN</u>
	Micki Slowman	Michael Jordan
	Linda Sparrow	
	Sally Stuckey	
	Sue Taylor	
	Geri Wadness	

FIGURE 1: BRIEF HISTORY OF LIFETIME LEARNING

1950 1960 1970 1980 1990 2000 2010 2016 .

EUROPEAN ORIGINS, mostly France and England, evolved into today's University of Third Age : U3A .

1962: NEW SCHOOL (NYC) IRP (INSTITUTE OF RETIRED PROFESSIONALS) "replicated on 500+ campuses in U.S."* .

1975: ELDERHOSTEL—known today as ROAD SCHOLAR .

FALL 1976: WWLL **2007: 501(c)(3) status.**

SPRING 1977: HARVARD HILR (INSTITUTE FOR LEARNING IN RETIREMENT) .

1976: FROMM INSTITUTE (San Francisco) .

1977: OSHER FOUNDATION **2001:OSHER (OLLIE): 119 CHAPTERS.**

? start date: U. SOUTHERN MAINE .

1977: AUSTIN (Texas) LLI (AARP charter for first 2 years) .

∞

***From New School's IRP website.**