



WISE
Worcester Institute for Senior Education

Date: May 19, 2021

To:

WISE Members.
Copy: Monica Gow, Director.
Jill Lagana, Office Manager.

From:

Tej Maini,
President, WISE.

The **Annual Meeting of the Members of WISE** will be held via Zoom on **Thursday May 27th, 2021 at 11.00 am.**

The meeting can be accessed at:

<https://assumptionwise.zoom.us/j/98211521951?pwd=Y09laHhPWjRRU3hZR21YTmMwMGtIQ09>



No.	Agenda Items & Speakers		Pages
	Call to Order	Dr. Tej Maini	
1.	Agenda		2
2.	Table of Contents		3
3.	Approval of the Minutes of the Meeting of 8.15.2020		4
4.	Annual Report		
	a) Treasurer	Chair, Ms. Susan Tellier	19-22
	b) Nominating Committee	Chair, Ms. Charlene Nemeth	23
	c) President	Dr. Tej Maini	5-42
	• Approval of Amended Bylaws*		
	d) Director	Ms. Monica Gow	
	<i>(All reports by the Leadership of WISE are attached).</i>		
5.	Dr. Kimberly Schandel	Dean, School of Graduate Studies, AU	
6.	Mr. Michael Guilfoyle	Executive Director, Communications, AU	
7.	Dr. Conway Campbell	Vice President, Student Advancement, AU	
8.	Keynote Speaker: Mr. Tim Murray	President, Worcester Regional Chamber of Commerce	
9.	Adjournment		

**** The Amended Bylaws were E-mailed to the WISE Members on May 3, 2021.**

Table of Contents

No.	Item	Pages
	Agenda Items and Speakers	
	Minutes of the Executive Committee Meeting	
	Annual Report	
1.	The WISE Organization	4
2.	Communications Committee	5
3.	Membership Group	5-12
4.	Curriculum Committee	13-15
5.	Summer Courses Development Subcommittee	16
6.	Class Assistants & Hosts Group	16
7.	Special Interest Groups	17
8.	Special Events Committee	17
9.	Finance Committee	18
10.	Nominating Committee	19
11.	Technology Advisor	20-24
12.	Development Group	25
13.	Diversity Group	26
14.	New Member Orientation Group	26
15.	Baseball Club	27
16.	Book Club	27
17.	Non-Fiction Book Club	28
18.	Movie Club	29
19.	Writing Club	29
20.	Director	30-33
21.	President	34-39

I. Minutes of the Meeting of August 15, 2020.

WISE Executive Committee

Minutes of the Meeting

Date: August 15, 2020

Chair: Tej Maini

Secretary: Pat Hertzfeld

Present: Sue Tellier, Monica Gow.

The meeting of the WISE Executive Committee was called electronically to approve the proceedings of the Annual Meeting of the Membership of WISE.

The following Documents were circulated on May 14, 2020, and voting was held from May 15, 2020 to June 15, 2020.

1. Minutes of the WISE Annual Meeting of June 4, 2019.
2. Recommendations of the Nominating Committee.
3. Revised Bylaws of WISE.

90 Members returned their ballots. The motion to approve the above passed 89 for and 1 against.

The documents above were approved in accordance with the Bylaws.

Approved by the WISE Council on 9.16.2020

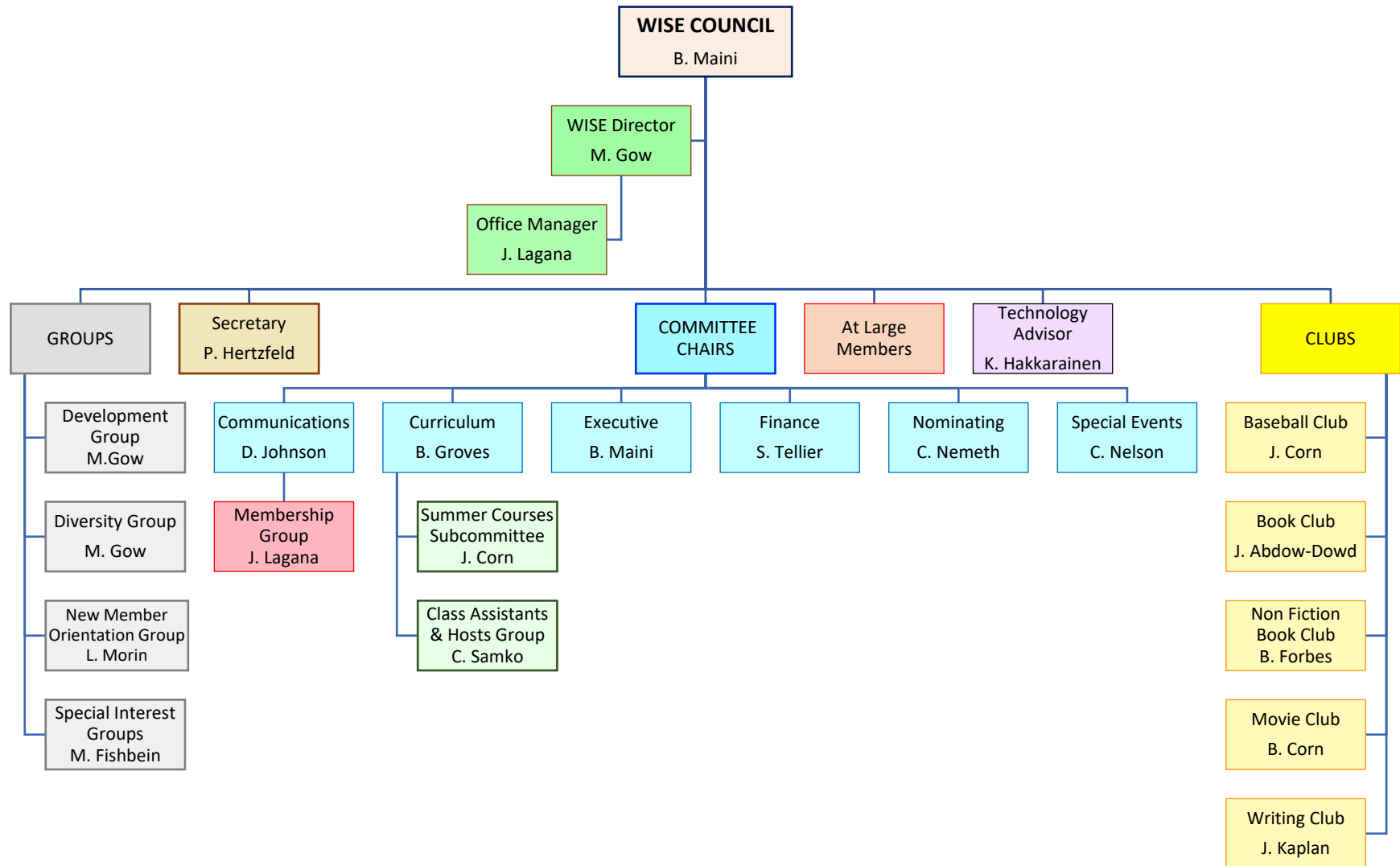
II. Annual Report

WISE

ANNUAL REPORT

Academic Year 2020 - 2021

I. WISE ORGANIZATION: 2020 - 2021



II. COMMUNICATIONS COMMITTEE.

Chair: Doug Johnson.

1. Published monthly Bulletin.
2. Posted events and community content on Facebook and Twitter accounts.
3. Edited all class videos -- clip the extraneous bits from the front/end of each session.
4. Edited five class videos for distribution to other Worcester non-profit organizations.
5. Launched new "Six-word Memoir" program.
6. Created new "Get to Know a Member" program.
7. Created promotional video based on "Six-word Memoir" contributions.
8. Reviewed/aligned the committee's role within WISE and how we can improve visibility, create new content and become more efficient.
9. Designed postcard for Q1/2021 annual fund request.

II (a). MEMBERSHIP GROUP

Jill Lagana, Coordinator.

Summary

The Membership group had a very successful year by exceeding expected enrollment goals each term during the COVID shutdown of our on-campus program. In May 2021 we reached 361 members (348 paid, 13 honorary) with a 327.62 FTE (294 full year, 54 spring). Our original goal was to have 250-275 total paying members to maintain our minimum financial status during COVID. We developed some new and updated methods of recruitment in order to extend our area's traditional program central MA outreach to other areas of MA, other New England states and beyond.

Report

1. Works with the Communications Committee to develop and improve strategies to increase membership.
This year we contributed to articles in the *WISE Bulletin*, Facebook page postings featuring registration periods with content that is shared on other social media, adding social media links to the e-newsletter *WISE Bulletin*.
2. Coordinates activities with Communications Committee to communicate the benefits of membership.
Through articles & benefits listings in the *WISE Bulletin*, website updates so benefits can be found easily and Facebook posting announcements. The Communications Committee members assisted by liking, commenting, and sharing posts. A WISE Office page was developed as well to assist with boosting to stay on the feed.

3. Ensures the continuous recruitment and retention of members within the parameters set forth in the bylaws of WISE. Focus on new and returning member recruitment and community outreach. (see attached listing of promotional lectures).
4. Our rolling admissions funnel plan for the past year and goals:
 - a) Spring- follow up and Summer Program Outreach
 - *2020 Goal=15 new Summer Participants.*
Actual= 28 for Summer 2020
 - Focus on Summer Participants' transition to membership
 - Free Lectures Series (Member Spotlight/Cultural or Community/Artist or Author Promotions)
 - Share end of year AU events
 - Promote volunteerism to increase volunteer pool
 - b) Late Summer/early fall- academic year kick-off
 - *2020 Goal=50 fall & full year new members.*
Actual= 67 for Fall 2020
 - Local media-news (T&G, Fox 25, Worcester Cable)
 - Online presence-FB, Twitter
 - Interviews
 - Personal outreach to senior centers, senior living facilities & libraries
 - Personal outreach to community organizations
 - Personal outreach through WISE retired Instructors & honorary members
 - Announcements about program through email
 - Outreach through Assumption's alumni network
 - WISE academic year kick-off promotional lectures
 - c) Fall/early winter - follow up and Spring outreach
 - Mailings & emails
 - Personal phone calls to new members
 - Assess Member needs & member experience
 - City of Worcester & Senior living communities content sharing
 - Free Lectures Series (Member Spotlight/Cultural or Community/Artist or Author Promo)
 - Promote Instructor & volunteer opportunities

- d) Winter/early spring- follow up, Retention and Building up interest
- 2020 Goal=10 new members.
Actual= 37 for Spring 2021.
 - Podcasts & cable channel content
 - More outreach through Assumption alumni network
 - Sharing information on WISE benefits through Assumption
 - Welcoming new members with orientation & onboarding
 - Free Lectures Series (Member Spotlight, Cultural or Community, Artist or Author Promo)
 - Promote Instructor & volunteer opportunities
5. Used the following tools and opportunities to recruit members, within MA and out of state:
- Weekly/monthly Email blasts using Wild Apricot and MailChimp
 - Personal phone calls to expired list before & during registration
 - Social media posts (Facebook, Twitter)
 - Outreach to community supporters to reestablish programs as centers transition to open up during COVID
 - Outreach to libraries and senior centers within New England via mail/email.

Snapshot of How New Members Heard About WISE (Spring 2021)

Respondents = 38 (New Spring Members)	
Heard About WISE	Percent
Promotional lecture invitation/posting	24
Promotional lecture invitation/posting	24
WISE Instructor referral	16
Social Media posting	11
Returning Member from 2017-2019	10
Assumption Alumni newsletter/email	8
Telegram & Gazette	2
From WISE Summer program	2

6. Defines the advantage of multiple learning methods: in-person, online and hybrid learning. Feedback about learning methods from classes and personal outreach are considered along with feedback from course evaluations. Out-of-area and Out-of-state members prefer online classes. Low-tech expired members prefer in-person classes. Only 8-9% of those whose membership has expired in our database are interested in online classes.

Reasons Why Membership Has Expired & Are Not Participating (31% did not respond)

Respondents = 74 (Full Year & Fall Expired Memberships)	
Reason For leaving WISE	Percent
No computer or laptop/tablet & afraid of Technology	42
Doesn't have time/doesn't like online classes	11
Spouse is a member & won't pay for a second membership	8
Caring for spouse/partner with illness or self- illness	8

Members with an expired membership are invited monthly to any promotional lectures and weekly to Coffee Break sessions so that they can become comfortable with online delivery.

7. Membership Data:

WISE New Members Distribution (Spring)	
Worcester	10
Other Central MA	14
Boston/Metro West	5
Other MA	5
Other New England	2
Other States in USA	1

8. Objectives for 2021-2022 academic year

- a) In consideration of the financial projected goal of 330 FTE for the next fiscal year, enrollment goals for the Membership Group include:
 - 339 FTE for fall 2021 and spring 2022
 - 315 full year, 40 fall and 40 spring
 - 140 projected for Summer 2021 and 180 for Summer 2022.
- b) Integrate WISE as a regular annual presence at the Assumption University events (Holiday, Family Weekend and Alumni events).
- c) Develop a set of quality video clips as content to boost the promotion of WISE through social and local media.
- d) Continue offering a diverse set of virtual promotional lectures focusing on community & culture, members & instructors, and authors/artists to attract new members.
- e) Develop & execute a plan to organically boost WISE's social media presence.

- f) Contact and promote WISE through news/podcast outlets based in Boston, Boston metro, North & South shore MA, plus northern CT & RI, southern NH.
- g) Continue to offer and possibly expand content offerings to local senior living communities.
- h) Once public fairs are operational, participate in wellness or other senior center/community organizational fairs with a booth to promote WISE.

Dashboard of Metrics

(For the Academic Years 2019, 2020 & 2021: June 1st through May 31st)

1. Membership

	Full Year	Summer	Fall	Spring
2018 - 2019	317	129	72	59
2019 - 2020	274	176	48	62
2020 - 2021	294	140	50	50

2. FTE Members

	FTE's
2018 - 2019	398.57
2019 - 2020	342.49
2020 - 2021	327

3. Honorary Memberships & Scholarships

	2018 - 2019	2019 - 2020	2020 - 2021
Honorary	18	14	13
Scholarships	4	3	3

4. New Members

	Full Year	Half Year (Fall)	Half year (Spring)	Half Year Totals	Upgrades Fall → Year	New FTE Members
2018 - 2019	31	18	25	33	3	50.8
2019 - 2020	49	17	17	34	8	70.2
2020 - 2021	59	8	37	46	6	87.6

5. Participants & Registrants.

		Participants	Registrants
2018-2019	Fall	72	833
	Spring	59	894
2019-2020	Summer	129	193
	Fall	48	874
	Spring	62	809
2020-2021	Summer	176	321
	Fall	50	873
	Spring	52	831

Key:

Participants = Number of persons participating in the WISE Programs

Registrants = Number of registrations for courses by participants

Spotlight Lectures

	Date	Speaker	Topic	Category	Attendees
1	8/17/2020	Ben Railton	Analysis of Star-Spangled Banner	Member/Instructor	74
2	8/19/2020	Krysta Cabral, AU	AU Student Dance	Community/Culture	52
3	9/4/2021	Monica Gow	Meet the Director	Member/Instructor	21
4	9/9/2020	Charlene Martin, AU	Welcome to Fall/History of WISE	Member/Instructor	80
5	10/21/2020	Thomas Dresser	The Ghosts of Martha's Vineyard	Author/Artist	76
6	12/8/2020	Carole Gariepy	In Isolation	Author/Artist	40
7	12/15/2020	Doug Johnson	Photographer & Writer Presentation	Member/Instructor	46
8	1/17/2021	Dennis Hohengasser, AARP	AARP Fraud Presentation	Community/Culture	108
9	1/26/2021	Stephen Dirado & Soren Sorensen	Photography Book & Film Presentation	Author/Artist	67
10	2/5/2021	Conway Campbell, AU	Diversity of Terms Toolkit	Community/Culture	37
11	2/16/2021	Calvin Hill	Social Construct of Race	Community/Culture	53
12	2/23/2021	Judy Heersink, AU	Reflections on Race	Community/Culture	15
13	3/9/2021	Joe Corn	Five Great African American Singers	Member/Instructor	55
14	3/10/2021	Clare O'Connor	Insights from Covid-19 Pandemic	Member/Instructor	58
15	3/16/2021	Dorothy Sachs & Veronica Howell	Worcester Public Library Resource Update	Community/Culture	24
16	3/18/2021	Rene Reyes, Suffolk Law Professor	Conversation on Originalism	Community/Culture	48
17	4/20/2021	Gene McCarthy	How to Read Poetry	Author/Artist	33
18	4/27/2021	Lynda Cohen Loigman	The Wartime Sisters	Author/Artist	54
19	5/4/2021	Harriet Forman	History of hand bells & demonstration	Member/Instructor	
20	5/18/2021	Debbie Hall	Worcester Black History Project	Community/Culture	
21	5/25/2021	Paul Buono, AU	Early Jazz History of New Orleans	Member/Instructor	

AU= Speaker affiliated with Assumption University

III. CURRICULUM COMMITTEE.

Barbara Groves, Chair.

- A total of 63 courses were offered online via Zoom. While the program continued its overall success, technical challenges haunted some instructors (as they often do with the tech equipment in Kennedy 119)
- Class assistants and hosts offered new and different volunteer services to courses/instructors but overall there was high praise for them. Members remained kind and patient during the occasional technological glitches.
- The summer program will offer 10 courses, some 3 days, most 5 days. The summer program has become a viable addition to WISE so the curriculum committee will absorb it into its annual schedule. Joe Corn was commended for his admirable work with a task force to develop the summer program.
- Electronic evaluations begun in 2020 have proven to be a vast improvement. More members submit evaluations so the committee gleans a more comprehensive analysis of the instructors, course materials and overall program.
- We have interviewed 14 potentially new instructors for the 2021-2022 year. Two of them would be teaching online from a remote site. Many of the new instructors have submitted proposals for the 21-22 year. Very few instructors volunteer their services; this is a significant change.
- For the first time in its history, WISE will have more course proposals than the budgeted number. The Curriculum Committee will make a decision at its May meeting about which courses to schedule. Since 2019, we have had to reduce our offerings by at least 5 classes each session.
- A decision was made to offer online courses despite an eventual return to the classroom. The committee is considering that half the classes would remain online once classrooms open to WISE members.
- As always, more members applied for a seat on the committee than there were openings. This year begins the new protocol of members able to serve two two-year terms. We had one resignation in 2021.
- A Vice Chair was appointed for the 2021-2022 year so the current chair will serve one additional year to help with the transition in leadership.

Curriculum Committee Courses - I.

No.	Course Types	2019-2020	2020-2021
1.	Art	6	5
2.	Culture	6	7
3.	Drama	3	1
4.	Economics	3	2
5.	Film	2	1
6.	Humanities & History	7	9
7.	Law	3	2
8.	Literature	8	8
9.	Music	3	3
10.	Nature	3	3
11.	Philosophy	1	2
12.	Poetry	4	3
13.	Religion	3	9
14.	Science	6	7
15.	Technology	2	1
	TOTAL	61	63

Curriculum Committee Courses – II.

No.	Location of Course	2019-2020	2020-2021
1.	Assumption University	35	*
2.	Kennedy Lecture Hall	8	
3.	Plourde Recreation Center Conference Room	4	
4.	Worcester Jewish Community Center	2	
5.	Congregation Beth Israel, Library	2	
6.	Briarwood Community Center	1	
7.	The Willows, Great Room	3	
8.	Worcester Art Museum	3	
9.	MA Audubon Broadmeadow Brook Wildlife Sanctuary	3	
10.	Southgate at Shrewsbury Retirement Community	0	
11.	*On-line Courses (Zoom)	0	63
	TOTAL	61	63
	Conversations with Instructors	25	0

III (a). SUMMER COURSES DEVELOPMENT SUBCOMMITTEE.

Coordinator: Joe Corn

	2018-2019	2019-2020
Total Number of Courses	9	8
Participants	129	176
Registrants	193	321

The original summer program developed by the Summer Course Development Subcommittee (SCDS) was to present 12 courses during June and July 2020. In April, due to the outbreak of Covid-19, and starting with D-session Spring courses, all in-person WISE courses were cancelled. The presentation of summer courses was converted to an on-line program, all to be presented using the facilities of Zoom. In converting course presentations from in-person to on-line, several courses were cancelled, as they did not lend themselves to that format. Ultimately, nine (9) courses were presented in the summer of 2020, with 193 participants. Twelve (12) summer participants became new full-time WISE in the fall.

The SCDS reformed in January 2021 to plan for the Summer 2021 course program, with courses to be presented in June and July. Ten (10) courses were selected for presentation. Eight (8) are 5-session courses; two (2) are 3-session courses. All courses will again be presented on-line employing Zoom technology. The 2021 Summer course catalog is to be issued on April 12th, and summer registration will begin on May 6th. Summer courses will run between June 14th and July 15th.

III (b). CLASS ASSISTANTS & HOSTS GROUP.

Coordinator: Cathy Samko.

1. Scheduled and verified Hosts and Class Assistants for AY 2021 Summer, A, B C and D sessions.
2. Together with Monica Gow, Karl Hakkarainen and Jill Lagana provided training and regular update meetings to Hosts and Class Assistants.
3. Ensured class coverage when a Host or Class Assistant is unable to attend.
4. Communicated with and responded to Hosts and Class Assistants regarding updates and issues.
5. Spoke with interested members regarding Hosts and Class Assistant duties to recruit new members.
6. Shared with Program Director any issues regarding Hosts and Class Assistants.

III (c). SPECIAL INTEREST GROUPS.

Coordinator: Michael Fishbein.

1. Supreme Court
<https://assumptioncollegewise.wildapricot.org/scotus-sig>
2. Energy and the Environment
<https://assumptioncollegewise.wildapricot.org/environment>

SIGs	2018 - 2019	2019 - 2020	2020 - 2021
Supreme Court			
No. of Meetings	9	2	5
No. of Attendees (Range)	-	15-25	15-26
Energy & the Environment			
No. of meetings	3	3	5
No. of Attendees (Range)	-	15-20	6-15

IV. SPECIAL EVENTS COMMITTEE.

Chair: Cookie Nelson.

Because of the COVID-19 Pandemic, no Special Events were held this year.

V. FINANCE COMMITTEE.

Chair: Sue Tellier.

1. The Finance Committee met five times during the year.
2. Every month the Committee prepared, distributed and reviewed the monthly financial statement. In months when we did not meet, the statements were reviewed via email.
3. The budget for the current year had been prepared assuming that membership would fall off by one third. We projected 285 FTE in the budget, but actually achieved 339 FTE as March 31, 2021. In addition, Assumption overcharged us for overhead for the past fiscal year, and credited our account with \$5,304 in this fiscal year to make up for it. The annual fund exceeded its revenue budget by \$2,254 as of March 31, 2021. Offsetting these windfalls, reprinting of all WISE materials with the new University logo cost us \$1,778 that was not included in the budget. The Director's hours were increased after the budget was approved, resulting in additional expense of \$4,806 plus fringe benefits. The committee anticipates ending up with a small surplus at May 31, 2021 when the University closes our books.
4. The Council approved budget for FY 2021-22 includes an increase in membership fees to \$300. Summer session fees were increased to \$50 for a five-session class. We included a reserve in case Assumption provides salary increases for its employees. In the Special Events budget, we included two brown bag events, as we had no idea when we might be allowed back on campus this year.
5. The term of the current Treasurer ends this year. She will be succeeded by Patricia Segerson, the current Vice Chair of the committee.

WISE Financial Statement as of 4/30/2021

INCOME Description	INCOME Actual as of 4/30/2021	ANNUAL BUDGET 2020-2021	% of Budget
<u>Membership Revenue:</u>			
Membership Fees	\$ 90,510.00	\$ 75,525.00	119.84%
Summer Revenue	\$ 13,320.00	\$ 10,000.00	133.20%
Less:			
Refunds	\$ (599.73)	\$ (1,000.00)	59.97%
PayPal Expense	\$ (2,150.05)	\$ (2,600.00)	82.69%
Total Membership Revenue	\$ 101,080.22	\$ 81,925.00	123.38%
<u>Other Income</u>			
Annual Fund Drive	\$ 10,429.00	\$ 7,500.00	139.05%
Overhead from 2019 Refund	\$ 5,304.00	\$ -	100.00%
Special Events Revenue	\$ -	\$ -	0.00%
Total Other	\$ 15,733.00	\$ 7,500.00	209.77%
TOTAL REVENUE	\$ 116,813.22	\$ 89,425.00	130.63%
EXPENSES Description	EXPENSES Actual as of 4/30/2021	ANNUAL BUDGET 2020-2021	% of Budget
<u>Personnel</u>			
Director	\$ 30,075.00	\$ 28,080.00	107.10%
Office Manager	\$ 26,042.65	\$ 29,250.00	89.03%
Total Fringe	\$ 4,401.58	\$ 4,385.75	100.36%
Honorariums for Lecturers	\$ 21,200.00	\$ 22,200.00	95.50%
Total Personnel	\$ 81,719.23	\$ 83,915.75	97.38%
<u>Operational Expenses</u>			
Wild Apricot	\$ 2,090.19	\$ 2,174.00	96.14%
IT Equipment	\$ 1,830.00	\$ 2,400.00	76.25%
Annual Fund Expenses	\$ -	\$ 1,000.00	0.00%
Reprinting with University Logo	\$ 1,778.04	\$ -	100.00%
Postage	\$ -	\$ 750.00	0.00%
Office Supplies	\$ 1,187.57	\$ 700.00	169.65%
SIGs and Faculty Lecture Series	\$ 400.00	\$ 1,280.00	31.25%
Honorariums for Summer Session	\$ 3,060.00	\$ 3,040.00	100.66%
Miscellaneous	\$ 100.00	\$ -	0.00%
TOTAL OPERATING EXPENSES	\$ 10,445.80	\$ 11,344.00	92.08%
Overhead (20% of Total Operating Expenses)	\$ 2,089.16	\$ 2,268.80	92.08%
TOTAL EXPENSES	\$ 94,254.19	\$ 97,528.55	-96.64%
GAIN (LOSS)	\$ 22,559.03	\$ (8,103.55)	278.38%
Prior Year Surplus (as of 6/1/2020)		\$ 42,835.88	
Total Income to Date		\$ 116,813.22	
Less: Expenses to Date		\$ (94,254.19)	
Fund Balance Excluding Investment		\$ 65,394.91	

In addition, we have \$ 35,000 invested with Assumption, the value of which at May 31, 2020 was \$ 35,684.49.

WISE Proposed Budget FY 2021-22					
INCOME	PROPOSED BUDGET				
Description	2021-2022				
<u>Membership Revenue:</u>					
Membership Fees	\$ 99,000.00	330 FTE times \$300 fee (\$150 each half)			
Summer Revenue	\$ 16,870.00	\$10 per hour for summer courses			
Less:					
Refunds	\$ (600.00)				
PayPal Expense	\$ (2,600.00)	Includes \$30/mo for Payments Pro			
Total Membership Revenue	\$ 112,670.00				
<u>Other Income</u>					
Annual Fund Drive	\$ 7,500.00				
Memorials	\$ -				
Special Events Revenue	\$ 7,100.00				
Total Other	\$ 14,600.00				
TOTAL PROJECTED REVENUE	\$ 127,270.00				
EXPENSES (actuals)	PROPOSED BUDGET				
Description	2019-2020				
<u>Personnel</u>					
Director	\$ 37,440.00	Director currently at 24 hours per week at \$30 per hour, 52 weeks per year.			
Office Manager	\$ 29,250.00	Manager currently at 25 hours per week at \$22.50 per hour, 52 weeks per year.			
Total Fringe	\$ 5,101.79	7.65% rate on salaries			
Reserve for 3% salary increases	\$ 2,155.00	Increase plus fringe benefits			
Honorariums for Group Instructors	\$ 25,600.00	64 Classes at \$400 per class with 100% taking the honorarium.			
Honorariums for Summer Instructors	\$ 3,680.00	8 at \$400 and 2 at \$240			
SIGS	\$ 320.00				
Total Personnel	\$ 103,546.79				
<u>Operational Expenses</u>					
<u>Office Related</u>					
Wild Apricot	\$ 3,500.00	Possible new course registration software			
IT Equipment	\$ 2,310.00	Zoom license and data storage fees.			
Marketing & Promotional Items	\$ 500.00				
Annual Fund Expenses	\$ 1,000.00				
Postage	\$ 250.00				
Office Supplies	\$ 1,000.00				
Director's Discretionary	\$ 1,000.00				
MLK Breakfast Table	\$ 250.00				
Professional Education	\$ 500.00				
Miscellaneous	\$ 500.00				
Scholarship Donation to Assumption College	\$ 1,500.00				
Special Event Expenses	\$ 9,200.00				
Total Operational	\$ 21,510.00				
Overhead (20% of Total Oper)	\$ 4,302.00				
TOTAL PROJECTED EXPENSE	\$ 129,358.79				
PROJECTED GAIN (LOSS)	\$ (2,088.79)				

WISE Proposed Budget FY 2019-20

Special Event Activities

Annual Lunch Revenue	\$ 1,800.00
Annual Lunch Expenses	
Food	\$ 1,500.00
Honorariums	\$ 300.00
Total, Expenses	\$ 1,800.00
Net Annual Lunch	\$ -
Holiday Lunch Revenue	\$ 3,350.00
Holiday Lunch Expenses	
Food	\$ 2,500.00
Decorations	\$ 100.00
Entertainment	\$ 400.00
Donations to Charity	\$ 350.00
Total, Expenses	\$ 3,350.00
Net Holiday Lunch	\$ -
Worcester Night Out Revenue	\$ 1,950.00
Worcester Night Out Expenses	
Honorariums	\$ 250.00
Food	\$ 1,700.00
Total, Expenses	\$ 1,950.00
Net Worcester Night Out	\$ -
Brown Bag Expenses	
Honorariums	\$ 600.00
Food	\$ 1,500.00
Net Brown Bag	\$ (2,100.00)

Total Special Events Revenue	\$	7,100.00
Total Special Events Expenses	\$	9,200.00
Net Special Events	\$	(2,100.00)

SKT3/1/2021

VI. NOMINATING COMMITTEE:

Chair: Charlene Nemeth.

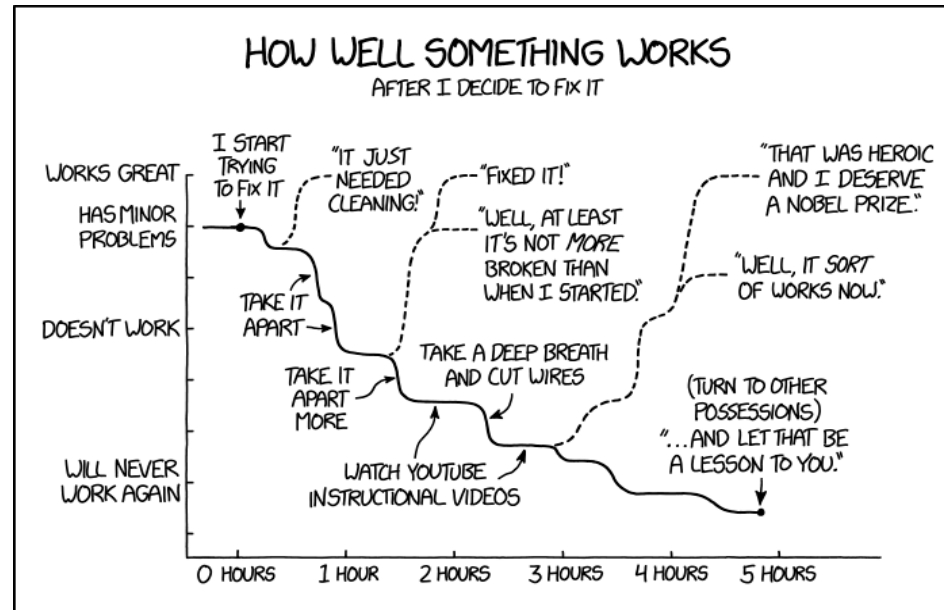
No.	Position	Name	Term Begins	Term Ends
1.	Treasurer			
		Susan Tellier	6/2017	5/2021
		Patricia Segerson	6/2021	5/2023
2.	Secretary			
		Patricia Hertzfeld	6/2020	5/2022
3.	Council Members-At Large			
		Ginny McNamara	6/2019	5/2021
		Michael Fishbein	6/2020	5/2022
		Antonio Simas	6/2020	5/2022
		Jennie Savage	6/2020	5/2022
		Robert McLaren	6/2021	5/2023
		Liz Tomaszewski	6/2021	5/2023
4.	President			
		Tej Maini	6/2019	5/2022

The Nominating Committee came together this year composed of members Donna Crocker, Bill Forbes and Tony Simas and myself. I have been very pleased with the dedication and sensitivity of committee members. They are all enormously qualified and contribute thoughtfully. Initially we agreed on guiding principles and established a yearly timeline to serve as a guide for deliberations and activities.

1. We experienced some setbacks in our strategy for recruiting candidates for Vice President, interviewing a total of 11 people who declined to be considered for a variety of professional and personal reasons.
2. After consulting with the President and Director, we refocused our efforts on candidates for the Members-At-Large category, which did prove more fruitful.
3. We are pleased to nominate Robert McLaren and Liz Tomaszewski for two vacant member-at-large positions. One additional candidate is still considering our offer and we expect a decision in the near future.
4. I would like to thank my fellow committee members for all their efforts this year and I look forward to next year's work.

VII. TECHNOLOGY ADVISOR.

Karl Hakkarainen.



Zoom and all that went with it.

With the cancellation of the 2020 D session courses because of the COVID-19 pandemic, we implemented a series of Conversations with Instructors via Zoom. This required a number of steps that proved helpful as we moved forward:

- We used my personal Zoom Professional license to host each session. We learned that we would need additional Zoom licenses:
 - WISE should not be dependent on one license (and one person). We needed to be able to share hosting and scheduling responsibilities.
 - We needed additional capacity in our courses. An individual Zoom license has a limit of 100 attendees; some of our courses and events easily exceeded that number.
 - For our summer program, we were able to use three licenses from Assumption.

- In June, we acquired a Zoom Education package of 20 licenses. In addition to the increased number of host licenses, we also gained access to the Zoom Account services, letting us share hosting responsibilities, view diagnostics of each session and attendee's audio, video, and CPU details, and gain access to the Zoom programming interface. To use these Zoom licenses, we needed to set up email aliases so that our hosts would not lose access to their personal Zoom licenses. Using the free email forwarding services offered by Google Domains, hosts have a new email address, <name>@assumptionwise.com, which they use to log in to Zoom and host WISE sessions.
- We discovered that event recordings were important. Initially, I would start the recording manually. After forgetting to do so a couple of times, we determined that all WISE courses and events would be recorded automatically on the Zoom cloud. This later required that we purchase additional storage to retain 30 days of recordings, around 100 GB. Separately, I would download and archive the recordings. We will need a recording retention policy as well as a plan to store these recordings in some WISE-owned repository.
 - Members need to have access to these recordings. By summer's end, I wrote a piece of software that would build a page of links to recordings and post the list on a members-only page on our website. I now run this report daily. Additionally, I run a similar report for our events, such as guest lectures and other forums.
- We developed an enhanced Class Assistant role, one who would introduce the instructor, read the announcements, guide attendees on the protocols of the class, and call on people at appropriate intervals for questions and comments. With Cathy Samko coordinating the volunteers, we held regular training and support sessions to assist the Class Assistants in their role. Procedures are documented on the WISE website.
- Instructors needed to learn how to teach on Zoom. We held group training sessions along with individual instructor training and preparation sessions initiated by Jill Lagana. We discovered needed to resolve various technical issues such as underpowered computers, placement of computers relative to lighting and audio, and other details. We established a few minimal requirements for instructors' computing environment, which are documented on the WISE website.
- We established practices to ensure the security of our sessions:
 - No WISE event Zoom links would be published on the open web. Links would be distributed on a members-only page on the WISE website or directly via email.
 - Only the host and co-host would be able to share screens.
 - Hosts or co-hosts would mute all attendee microphones and monitor the session for background noise and unrelated commentary.

- The Zoom programming interface gives us rudimentary information about the location of our members when attending our classes and events. This allow us to produce maps that can be an effective marketing graphic for WISE. Below, for example, is a map of the location of attendees for a recent class:



Technical Stuff

As noted, I have developed some software to help with the management of our Zoom scheduling and reporting. The code is available on GitHub: <https://github.com/RoasterBoy/WISE-Tools>. Although the code is publicly available, the security keys that are required to run the program are not.

Currently the Zoom management program runs only on Linux. I have a plan to allow the program to run in a Mac terminal session (BSD) as well. This extra activity may not be needed if a future course management system supports Zoom integration.

Presentation

On March 20, 2021, I delivered a presentation at the New England Regional Developer (NERD) Conference. The recorded presentation is here, [Not your typical flip to Zoom](#). Slides are [here](#).

Zoom Coffee Breaks

With Monica Gow, Jill Lagana, and Bill Stone, we held weekly sessions to help WISE members with their questions and issues related to Zoom. Other topics related to system configurations, email management, and passwords invariably showed up.

We did not keep formal records of attendance. In spring 2020, we'd have 20 or more attendees and steady, but dwindling numbers through the year. During spring 2021, we'd often have no participants.

We will continue to offer this service as long as needed. As we prepare for the summer and fall sessions, we expect that there will be new and former members who may have questions about Zoom and participating in online WISE classes.

Things that are not about Zoom

Wild Apricot.

We have continued with Wild Apricot (WA) as our membership, course, and web management software service. Resulting from this year's work with Zoom, several important limitations have become more visible.

- We cannot programmatically update web pages. When I generate a list of links for courses, meetings, and recordings, I must manually copy and paste that information into a page, rather than being able to update the page directly from the program. This means that I do this manual step daily.
- We have policy documents, organizational charts, lists of past courses, and the like that must similarly be updated manually.
- Astonishingly for a membership management product, we cannot get an automated view of membership trends for more than a single year.
- WA's email editor is terrible, requiring extra effort to ensure quality communications to our members and contacts. (See below under MailChimp). There is no way to have a non-WA admin to review an email prior to sending.
- WA changed the interface to PayPal, our payment processor. As a result, we can no longer easily take credit information over the phone. (WA technical support has provided us with an ugly workaround.) We cannot use WA's preferred payment processor because that service does not work with Assumption's financial management; as a result, we have to pay an additional 20 percent not to use their service.
- Finally, in April 2021, WA announced a 20 percent increase in the fee.

At this writing we are reviewing several alternatives to Wild Apricot. It's late in the year, and we may not be able to change systems for the Fall 2021 session. Our requirements and evaluations processes are documented

separately. I have several small programs that generate lists of past courses, sorted by category, and reports on registrations. I will be updating these programs to link with our Zoom attendance data.

Course evaluations.

In the C session of the 2019-2020, we implemented online course evaluations. It turned out to be even more important than we thought because, with the shift to online courses, we needed to have an online evaluation method.

We are using Google Forms because it's free. It's also a tedious manual task to set up and distribute the forms. Tabulation of the results, however, is quick. I wrote a small program to format the evaluation results into a report that Jane Gilligan can easily use to prepare her reports.

I've looked at alternatives to Google Forms, such as Survey Monkey, QuestinPro, and Microsoft Forms. All have a few advantages, but don't yet have a way to get around the manual setup and distribution.

Logo and other design work.

I updated and simplified the WISE logo, using a single color, with and without the full name. This logo is in use on our website and in our communications.

Email communications

We use MailChimp for our monthly Bulletin. Our open, click, and general response rate has declining. We're seeing a 45% open rate, down from an average of 55%. Internal communications using Wild Apricot does better, close to 60%.

Website

I've added content to the website, both on the front page and deeper within.

Google is changing its search algorithms in May, giving higher value to sites that load quickly. Our website scores [17 out of 100](#). Nearly all the deficiencies are the result of bloated code provided by Wild Apricot.

Because relatively few of our prospective members find us via search, this may have limited impact for now. We cannot, however, have a website that performs poorly, particularly on mobile devices.

While it's tempting to put the blame on WA design limitations, of which there are many, most of the website's shortcoming comes from my lack of time and attention.

What's ahead?

At some point in the coming academic year, we will need to offer hybrid classes with some members attending in person and others online. We know that changes are coming but won't have details until we are allowed to return to the Assumption campus and to other external venues.

If we continue with Wild Apricot, I'll need to bolster the reporting on various aspects of our operations. If we choose a new system configuration, then things get, um, interesting all over again.

VIII (a). DEVELOPMENT GROUP

Coordinator: Monica Gow.

- Created a plan and solicited input from AU IA Vice President.
- Improved the ease of making a gift to WISE by adding a “donate” button to the WISE home page and modifying the donation page.
- Solicited donations through three requests: two electronic and one post card mailed through USPS.
- As of May 5th, raised \$12,036 for the Annual Fund exceeding the \$7,500 goal. Mailed thank you/acknowledgement letter to all donors.
- Recruited WISE members to assist with grant writing. In the initial stages, but will pursue grant opportunities.
- Mr. Tim Stanton, VP University Advancement at AU has resigned effective May 31, 2021, to pursue other opportunities.

Category	Number in Each Category	Donated
WISE Council	15	87%
Group & Club Coordinators	8	86%
Membership	319	28%

Donations	Number
\$1 - \$49	27
\$50 - \$100	71
\$101 - \$200	5
\$201 - \$500	2
\$501 - \$1,000	3
Total	108

VIII (b). DIVERSITY GROUP

Coordinator: Monica Gow.

- Kicked off the Diversity Initiative at two Zoom meetings with special guests including Assumption President and other AU leaders, WISE President, and fifteen Worcester community cultural leaders to share about the program and our plans to diversify WISE.
- Other steps to diversify WISE include announcing monthly cultural celebrations in the Bulletin and offering four of our Guest Lecture Sessions on racial diversity.
- Met with Catholic Charities who will try to use grant money to enroll 10-15 members. Will explore using Catholic Charities as a post-pandemic teaching venue.
- A Diversity Group has been formed with five members, three from outside of the WISE community. We will continue to seek other ways to diversify the WISE community. The next meeting is scheduled for May 21, 2021.

VIII (c). NEW MEMBER ORIENTATION GROUP.

Coordinator: Lee Morin.

1. Two meetings of the New Members Orientation Group were conducted in 2020-2021, before the Fall and Spring Semesters began. Meetings were held on the Zoom platform and all of the WISE leadership was invited to join and share information about their committee or group.
2. As new members joined WISE, Jill informed them of the WISE NMO Orientation. Each new member also received a downloadable WISE Member Guide.
3. New members were invited and welcomed at the weekly Zoom Coffee Break, an opportunity to meet some WISE folks, ask technical questions and learn more about WISE.
4. With the move to a virtual learning model, WISE attracted new members from all areas in Massachusetts, other states and Canada.

IX (a). BASEBALL CLUB.

Coordinator: Joe Corn.

Due to the outbreak of the Covid-19 virus, it was impossible to schedule and attend any games in 2020. As of this writing in April 2021, it is currently not known if the Worcester Bravehearts will resume their normal summer baseball schedule at Fitton Field in Worcester, and what protocols will be required at the stadium. It is hoped that one or two baseball outings can be scheduled this summer.

In addition, the Boston Red Sox's AAA farm team has moved from Pawtucket, RI to Worcester, and will begin play in the Spring of 2021 at newly constructed Polar Park in Worcester. At the time the move to Worcester was announced, a special arrangement was established between Assumption University and the Red Sox organization. It is hoped that this relationship will permit the WISE Baseball Club to participate in game attendance and perhaps in other special ways in 2021. At the present time, further details are unknown.

IX (b). BOOK CLUB.

Coordinator: Joyce Abdow-Dowd.

No.	Date	Book	Author
1.	10.22.2020	Disappearing Earth	Julia Phillips
2.	12.10.2020	A Long Petal of the Sea	Isabel Allende
3.	1.28.2021	Wolf Hall	Hilary Mantel
4.	3.18.2021	Barchester Towers	Anthony Trollope
5.	6.23.2021	The House of Broken Angels	Luis Alberto Urrea

IX (c). NON-FICTION BOOK CLUB.

Coordinator: Bill Forbes.

The following books were selected to be read in the 2020-2021 academic year:

No.	Book	Author
1.	Longitude: The True Story of the Genius Who Solved the Greatest Scientific Problem of His Time	Dava Sobel
2.	Our Inner Ape: A Leading Primatologist Explains Why We Are Who We Are	Frans de Waal
3.	The Great Bridge: The Epic Story of the Building of the Brooklyn Bridge	David McCullough
4.	Rising Out of Hatred: The Awakening of a Former White Nationalist	Eli Saslow
5.	The God Delusion	Richard Dawkins

1. As of April 19, 2021, we have 23 members – 9 men and 14 women.
2. Thanks to Mike Fishbein and Karl Hakkarainen, WISE members can now join the N-F Book Club (and other Clubs/SIGS) through the WISE web site. The membership list is kept up-to-date automatically by custom code added to the Wild Apricot application.
3. Members participate in decision-making about book selections, meeting times, et cetera. Meetings to discuss books are advertised to the entire WISE community and are open to all.
4. We usually meet via Zoom from 1:30 – 3:00pm on the 2nd Friday after the end of each WISE session. Typically, 8-10 members attend each meeting.
5. At this time, we plan to read 4-5 books in the 2021-2022 academic year.

IX (d). MOVIE CLUB.

Coordinator: Bobbi Corn.

No.	Date	Movie
1.	8.20.2020	Suffragette
2.	9.8.2020	Iron Jawed Angels
3.	9.8.2020	The Divine Order
4.	10.4.2020	Marshall
5.	11.14.2020	Chicago 7
6.	12.7.2020	The Life Ahead
7.	1.24.2021	Abe and Phil's Last Poker Game
8.	4.26.2021	A Promising Young Woman

IX (e). WRITING CLUB

Coordinator: Josette Kaplan.

1. On July 10, 2020, Josette Kaplan replaced Mariam Cronin as Coordinator of the Writing Club (formerly called the Writing Workshop).
2. The group has been meeting on a regular basis via Zoom every 3-4 weeks since March, 2020, due to the Coronavirus.
3. Protocols, procedures and meeting schedule are decided collectively.
4. The group continues to encourage fellow writers to hone in on their writing strengths and experiment with different writing genres. One of our accomplished poets, Eve Rifkah, has another book of poetry slated for publication!
5. Over the past two years, participants in this club have forged new friendships and have gained the support and trust of fellow writers.

X. DIRECTOR.

Monica Gow.

First, I would like to thank many people in WISE and Assumption who provided support and helped me ease into the Director role. I acknowledge all of the support provided by the WISE President, Council, At-Large Members, Committee Chairs, Group and Club Coordinators, the Tech Advisor, Office Manager, AU Institutional Advancement, AU Communications, AU Student Success, and AU Graduate Studies Office.

Membership

- During a difficult academic year due to the pandemic, WISE budgeted a goal of 285 FTE members. We exceeded that goal and secured 327 FTE members.
- Virtual Learning enabled WISE to expand its geographic area attracting new members from all areas of Massachusetts, New England, other US states and Canada. With remote learning, WISE geographic boundaries have been eliminated.
- The membership increased due to varied efforts including traditional and social media, direct, targeted outreach to individuals, senior centers and libraries.
- Implemented a “Give the Gift of WISE” campaign to engage with new members and encouraged current members to spread the word about WISE to friends and relatives.
- Offered free promotional guest lectures welcoming both members and non-members as a way to “get a taste of WISE”.
- Negotiated with Assumption Communications and Institutional Advancement Departments to post an Ad about WISE in their communication channels to AU alumni.

Media

- Increased presence on social media platforms including Facebook, Twitter and LinkedIn. Used social media to promote the program.
- Reached out to 25 traditional media platforms which resulted in three of the following earned media spots. Collaboration with Senior Centers and social media posts presented other media opportunities.

- Earned Media Opportunities:
 - 8/24/20 Worcester Business Journal article- Senior centers are struggling to keep the elderly active during the pandemic.
 - 9/24/20 Worcester Telegram article - WISE Senior Learning Program Takes to Zoom During Pandemic.
 - 10/07/20- WCRN Talk of the Commonwealth, Hank Stolz radio spot - interviewed Instructor Jack Ross about his WISE class and the program.
 - 10/08/20 - WCUC Troy Tyree radio spot - interviewed Director Monica Gow about WISE.
 - 10/20/20 - Boston 25 Fox News, reporter, Scott McDonnell tv news story - Senior citizens head back to class with remote learning.
 - 11/24/20 - Salisbury500 Video, by host John DiPietro - WISE promotional video.
 - 01/26/21 - Live on Frank & Mary Cable Show, Northborough Senior Center.
 - 03/15/21 - Chamber Exchange article, Worcester Chamber - Assumption Welcomes Worcester's Seniors to WISE Up | Assumption University.
 - 05/01/21 - Fifty Plus Advocate article, writer Jane Gordon.

Outreach

- Collaborated with Briarwood Retirement by sharing content from one course per quarter, totaling four WISE recorded courses in FY21 creating another revenue source for the program.
- For the first time in WISE history, collaborated with the Worcester Senior Center (City Manager's Office) by sharing content through their government cable channel. This was a city-wide initiative to help support the Worcester senior population who have experienced isolation during the pandemic. WISE received free advertising in The Senior Scoop, their newsletter.
- Expanded the list of senior centers and libraries and communicated regularly about WISE membership, benefits and free promotional sessions.
- Negotiated with 9 Instructors to release their recorded course content to be shared with Briarwood Retirement Community and City of Worcester, Senior Center.

Programming

- Implemented Guest Lecture Series which are free, promotional sessions for WISE members and non-members. WISE will have conducted 20 sessions through May 31st.

Operations

- Oversee all WISE operations and lead with a positive, transparent approach.
- Lead a team with the WISE Office Manager to provide the highest level of customer service to the WISE community and its constituents including members, Instructors, Council, all Committee Chair and Committee Members.
- Ability to adapt and be flexible in a changing world. Look for opportunities to change and improve the efficiency of the workflow.
- Helped to support the launch of the first WISE session on Zoom during the Summer of 2019.
- Continually reviewed, listened and received feedback to make improvements to the online program through the Summer, Fall and into the Spring sessions.
- Provide group and 1-1 training sessions as needed. Attended all Committee and Council Meetings and participated when appropriate.

Curriculum

- Collaborated with Curriculum Chair and Committee Members by supporting the process of curriculum development, class schedule, catalog creation, to launch five online WISE sessions.
- Co-interviewed twelve prospective WISE Instructors. Support the Curriculum Chair as necessary in order to present the course proposals in an organized manner.
- Provide training to Instructors and work with them 1-1 when needed.

Finance/Treasurer

- Performance against FY21 Budget
 - As of March 31, 2021, exceed year budgeted revenue by \$30,000.
 - Projected expenses to be less than budgeted and end FY21 with a positive net income.
- Support Financial Committee creation of monthly Financial Statement by submitting a monthly budget summary.
- Secured a purchase card through Assumption and submitted monthly transaction reports.
- Developed and presented a FY22 draft budget.
- Significant changes to the FY22 budget include an increase in fees from \$265 to \$300 for a full year; \$150 for half year membership.
- Suspended the Special Interest Groups until we are back in person, FY22 D Session.

- Proposed increase in the Summer class fee to \$50/5-session course was accepted.
- Worked with the Finance Committee to get buy-in and approval. Presented the FY22 budget to Council for final approval.

Class Assistant (CA) & Host Coordinator

- Assisted with recruitment efforts to engage members as volunteers in the role of CAs and Host on the Zoom platform.
- Provide training sessions and 1-1 training when needed for CAs and Hosts. Meet 1-2 times per session to check-in with the CA & Host group of volunteers.
- Solicit feedback from CAs & Hosts to continually improve the online education model.

Communications

- Worked with the Tech Advisor to refresh the WISE logo
- Supported the tasks of the Communication Committee.
- Grew the Twitter account from 3 to over 100 followers.
- Used Twitter, Facebook and LinkedIn to engage with members and non-members.
- Used proper tagging to reach senior communities and engage with Assumption's online community.
- Supported and implemented the campaigns (Six-Word Memoir and Get to Know a WISE Member) created by the Communication Chair.

Training & Orientation

- Conducted two training sessions per year for CAs & Hosts, Instructors and New Members.
- Created an environment of an "open door" policy to listen to members' feedback and answer questions. Responded to Member and Instructor emails and phone inquiries by the end of the day.
- Made the January 2021 Instructor Orientation a requirement.

XI. PRESIDENT.

Tej Maini.

1. First of all, I want to extend my thanks to Ginny McDonough for having so ably served as an At-Large Member of the WISE Council, to Sue Tellier for serving as the Treasurer and the Chair of the Finance Committee and to Cookie Nelson for serving as the Chair of the Special Events Committee. On behalf of the Council, I thank all of you for your contributions.
2. I would like to extend a warm welcome to Patricia Segerson as the incoming Treasurer and Chair of the Finance Committee, and to Claire Forgues as the incoming Chair of the Special Events Committee.
3. I also extend a welcome to Liz Tomaszewski and Robert McLaren as the new At-Large Members of the WISE Council. The biographical information of these individuals has been provided to you (*Pages 36-39*).
4. I want to thank the Committee Chairs, Group and Club Coordinators and Technology Advisor for their hard work in making WISE have a successful year.
5. On behalf of the Council, our sincere thanks to Jill Lagana for her hard work during a difficult year.
6. We all owe a tremendous amount of gratitude to Monica Gow, who navigated these turbulent waters, and despite COVID-19 managed to achieve a great deal of success as measured by a whole host of metrics.
These metrics, which will be presented at the September meeting in some detail, show how the hard work which went into growing our membership, yielded results.
7. I would be remiss, if I did not acknowledge the leadership of the Council as they undertook this journey.
8. A special thank you to our Secretary, Pat Hertzfeld for her precise, accurate and 'short' note taking. It was perfect!
9. On behalf of all the members of WISE, THANKYOU to the Leadership and the staff of Assumption University for their guidance during these trying times.
10. And finally, I owe an immense sense of gratitude to the hundreds of members of WISE, who braved COVID and supported us along the way.
11. We have gone through a rocky twelve months, and thanks to our collective creativity, we have emerged, better and stronger.

The Incoming Chairs, Vice Chair, At-Large Council Members.

(a) Patricia A. Segerson

Treasurer; Chair, Finance Committee

Education

- Master of Business Administration, Health Care Management/Boston University, Boston, MA
- Bachelor of Arts, Psychology/Manhattanville College, Purchase, NY

Professional Experience

- UMass Memorial Health Care/Worcester, MA
 - Administrator, Department of Pediatrics: September, 1998 – March, 2018 (Retired)
Manage the financial and operational components of a \$40M+ Department.
 - Director, Primary Care Development; Assistant to the Chief Operating Officer: April, 1996 – August, 1998
Assist in contracting and recruitment of primary care network throughout Worcester County. Includes acquisition strategy, co-location development and new practice start up activity.
- Independent Consultant August, 1995 – December, 2014
 - Provide project work for medical groups, health centers and hospitals including audits, review of financial performance, design of compensation and incentive programs, negotiations with hospitals and managed care programs, and practice valuations. Evaluate business development options for new ventures.
- Beverly Hospital/Beverly, MA
 - Vice President, Physician Network Development: August, 1994 – August, 1995
Provide leadership and administration for physician acquired group practices. Includes network strategy and development, practice valuation and acquisition, marketing and contracting, development and implementation of incentive program and installation and maintenance of accounting and data management systems.
- Medaphis Physician Services Corporation (formerly Professional Management Services)/Canton, MA
 - Regional Manager – Management Services: May, 1990 – August, 1994
Responsible for the provision of business consulting and management services to a broad base of physician group practices.

- Prudential/PruCare of Massachusetts/Boston, MA
 - Director of Operations: August, 1985 – May, 1990
In startup managed care program, directed development of comprehensive provider network. Managed financial operations, including capitation. Responsible for recruitment and contract negotiations, claims pre-certification unit and utilization management area.
- Professional Management Systems/Canton, MA
 - Senior Consultant: November, 1981 – August, 1985
Managed hospital-based physician group practices, oversaw accounts receivable management of billings, other income and expenses, entity structure, financial supervision, coordination with professional advisors, and supervision of marketing efforts and results.
- The Cambridge Hospital, Department of Psychiatry/Cambridge, MA
 - Budget Director: October, 1980 – November, 1981
Coordinated and managed departmental budget, training programs, recruitment, grants and general administration of \$2.5M department.
- Bentley College, Institute of Paralegal Studies/Waltham, MA
 - Program Director: September, 1976 – October, 1980
- US Department of Justice, Office of the Solicitor General/Washington, DC
 - Paralegal: August, 1974 – August, 1976

(b) Claire Forgues

Chair, Special Events Committee

- I am currently retired. Prior to retirement I was co-owner and office manager of Forgues, Doctors of Optometry.
- I was Chair of the Millbury Cultural Council.
- Member of the Art in The Park Committee.

(c) Joan T. Barry
Vice Chair, Curriculum Committee

Administrative Experience

- St. Mary School, Shrewsbury, Massachusetts 2008-2016
 - Principal
- Teachers 21, Wellesley, Massachusetts 2006-2018
 - Director of Professional Development
- Stonybrook Middle School, Westford, Massachusetts
 - 2002-2006
 - Principal, opened a brand-new Middle School
- Shrewsbury Middle School, Shrewsbury, Massachusetts
 - 1995-2002
 - Assistant Principal
- Mountview Middle School, Holden, Massachusetts
 - 1989-1995
 - Associate Principal
- Eastchester Middle/High School, Eastchester, New York 1969 - 1989
 - Home Economics Teacher

Education

- Harvard University / Cambridge, Massachusetts
Certificate, Principals Institute, Summer 1994
- Teachers College Columbia University / New York, New York
 - Ed.M. Administration and Supervision 1991
 - M.A. Family and Community Education 1975
- Framingham State University/ Framingham, Massachusetts
 - B.S. Home Economics 1969
- Notre Dame Academy / Worcester Massachusetts 1961-1965

Related Interests

- Shrewsbury Public Library, Shrewsbury, Massachusetts, 1996 - Present
 - Trustee
- Worcester Art Museum, Worcester Massachusetts
 - Members Council, 2008 - Present
 - Docent 2016 - Present
 - Acquisition Advisory Council, 2017 -Present
 - Salisbury Society Member, 2017 -Present
- Higgins Armory Museum, Worcester, Massachusetts
 - 1992 -2002
 - Board Member ,2000-2002
 - Education Committee, 1999-2000

(d) Liz Tomaszewski

At-Large Council Member

Liz Tomaszewski began her career working in manufacturing management in the pharmaceutical, health care, and wire fab industries where she was responsible for production planning, purchasing, and inventories. Her personal interests led her to a role in sustainability at a local university where she focused her effort on community engagement and sustainable campus operations.

(e) Robert McLaren

At-Large Council Member

Robert McLaren retired from National Grid in 2008 as president of Massachusetts electric distribution. After his retirement, he volunteered at the American Red Cross, and served on its board of directors. He is currently chairman of the board of Central One Federal Credit Union and is a board member of the Ecotarium and the Central Massachusetts Housing Alliance. Mr. McLaren holds a B.S. in Civil Engineering from UNH and an M.B.A. from Clark. Mr. McLaren and his wife, Penny, live in Shrewsbury and West Harwich.