



December 2022

LEARNING IN RETIREMENT OF WAUKESHA COUNTY INC.

ANNUAL REPORT

July 01, 2021 – June 30, 2022



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**WAUKESHA
COUNTY TECHNICAL
COLLEGE**

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Higher Ed



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PRESIDENT'S REPORT

OVERVIEW

Learning in Retirement of Waukesha County Inc.'s (LIRWC) main focus this fiscal year was to grow our membership after the tumultuous past year dealing with the fallout of the COVID Pandemic. Its impact on the organization cannot be understated. LIRWC did learn that all the LIRs in Wisconsin were experiencing the same repercussions and the need to focus on rebuilding memberships and course levels.

LIRWC's annual budget for this year was built on a modest increase in membership from last year's 165 to a target of 200. We ended the year at 258 members with 50 new members. Our inquiry database increased slightly to 342, but we learned that there was a "shadow" database in the WCTC system that had 620 members inactive over the past two years' i.e., not current members that are automatically purged by the system, but not deleted. We built a recovery program targeting these previous members with the mailing of the current course catalog and invitations to our Annual Kick-off Event with a ten percent (10%) discount to rejoin. The Board also authorized a reduced \$45.00 membership dues for new members only that join in the spring.

Our Annual meeting was joined by new WCTC executives: Richard Barnhouse, President, Brad Piazza, VP Learning and Timothy Holloway, Associate Dean Community & Professional Services, and LIRWC liaison.

LIRWC continued its community outreach campaign and presentations to local clubs and organizations, attendance at the two bi-annual 50 Plus Senior Fests and staffing booths at several other local fairs that contributed to reaching our target audience with an average of 30-40 inquiries gathered at various events. In addition, we took out promotional ads and advertorials in the 50 Plus publications, outreach to several senior community centers and press releases to local publications.

After considering several options, LIRWC worked with the WCTC Web Development Group to build a new online registration system in time for the upcoming fall 2022 semester.

Financially our year was basically a breakeven with a minor loss of only \$1,238.00.

We lost two valuable board members that resigned for personal reasons – the Treasurer and Membership Chair. We were able to bring on board a replacement for the Treasurer's position mid-year. The Secretary, and Membership and Promotion Chairs remain vacant. All current members have signed the Conflict of Interest Policy.



The Special Interest Groups (SIGs) were all in a rebuilding mode as well with all but two returning from hiatus by spring; the search for new Coordinators for Bridge and Theatre; Singers finding a new location to practice; the addition of Game Playing and Recipe Trading; the disbanding of Creative Crafters.

Special Events rebounded quite well with the successful recruitment of five new committee members. With venues reopening after COVID shutdown the committee was able to organize several trips, including ones to Oshkosh, Lake Geneva, Sheboygan, Lincolnshire and the WCTC Pewaukee campus with our very own Annual Sock Hop.

We recalled one of the laid off office clerks at five hours per week. LIRWC also took on a WCTC graphics student as an intern at no charge for six weeks over the summer to work on basic graphic elements for LIRWC.

Our Liability Insurance increased three percent (3%) and we added Wisconsin Workman’s Compensation Insurance as required by law since we moved to Waukesha State Bank Payroll Services group.

A Memorandum of Understanding (MOU) proposed by WCTC remains tabled by WCTC.

LIRWC founding member Doris Harrison and long-term instructor Don Rambadt both passed away in addition to several other members remembered in the BYTES Bulletin.

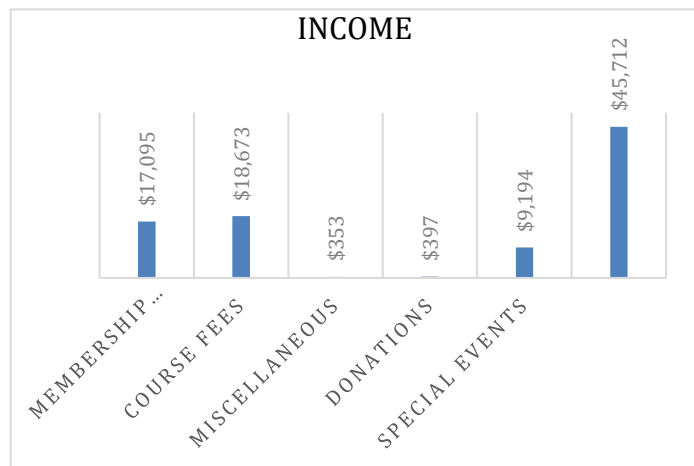
TREASURER’S REPORT

Financial Overview -2021-2022

The overall health of the organization is in a very good shape. Our income from membership dues and course fees was better than the Plan due to achieving 258 members which was approximately 50 more than our membership Plan target. This compensated for the larger outlay of expenses mainly due to an increase in liability insurance; a slight increase in salary due to the recall of one of the office clerks laid off during COVID; and printing and postage costs. Special Events did a very good job of controlling costs and charging the correct amount for trips and events. The positive variance is mainly due to the lag time between the end of one fiscal year (June) to the start of the next fiscal year (July) and the processing of invoices and income.

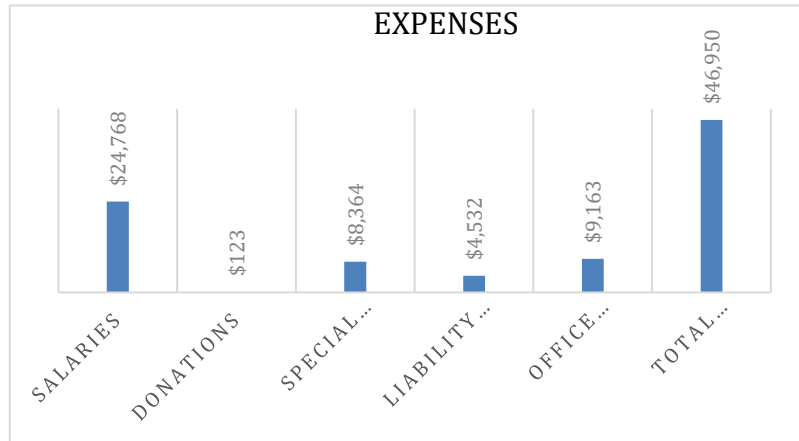
Our bottom line for the fiscal year was a loss of \$1,238.00 which is basically hitting Plan.

<i>Income</i>	
Membership Dues	\$17,095
Course Fees	\$18,673
Miscellaneous	\$353
Donations	\$397
Special Events	\$9,194
	\$45,712





Expenses	
Salaries	\$24,768
Donations	\$123
Special Events	\$8,364
Liability Insurance	\$4,532
Office Expenses, Printing, Postage	\$9,163
Total Expenses	\$46,950
Profit (Loss)	(\$1,238)
Beginning Fund Balance	\$24,038
Ending Fund Balance	\$22,800



FINANCIAL HIGHLIGHTS

Submitted the annual Wisconsin State Annual Report and 990-EZ federal taxes with the assistance of our CPA Jason Birner, who has verified our organization as a non-profit. Our Wisconsin State Gambling license was renewed to cover our raffles.

LIRWC moved its payroll system to the Waukesha State Bank Payroll Services group beginning January 2022. The Board authorized the hiring of additional office support to replace the clerks laid off during the COVID Pandemic.

As a result of moving off WCTC’s system we had to initiate Wisconsin Workman’s Compensation Insurance. Our General Liability Insurance increased three percent (3%).

SECRETARY’S REPORT

The Board did not have a dedicated Secretary to take the minutes of all regular and special board meetings; however, the office administrator covered this function for the Board. Copies of all meeting agendas and minutes were filed electronically in the database and hard copies were retained in the office binder per Wisconsin State regulations. Committee reports were maintained by each committee with agendas and meeting minutes provided for electronic filing and hard copies retained in the office binder.

DELEGATES-AT-LARGE REPORT

The two (2) Delegates-at-Large (DALs) monitored the organization’s general email account (lirwcquestions@gmail.com) established for our members. Any email where the DAL could not provide an answer, it was presented to the Board for review and discussion, and the DAL reported back to the member who submitted the question. No major issues were reported during the year.



MEMBERSHIP / PROMOTION REPORT

This year was a continuation of membership rebuilding activities. We budgeted for a modest 200 membership growth from 165, but achieved 258. We signed 50 new members through a campaign targeting our existing inquiries list, but also approximately 620 past members who have been inactive for two years by offering them a ten percent (10%) discount to rejoin. In addition, it was approved by the Board to offer a \$45.00 membership fee to new members only that join in the spring semester. Our inquiry database still supports 342 contact records.

LIRWC conducted or attended several local senior fests and events and gathered over 60 new leads. LIRWC offered free memberships or a 50/50 raffle drawing:

1. Annual Kick-off Event
2. 50 Plus Fall Senior Fest
3. 50 Plus Spring Senior Fest
4. ADRC Senior Event
5. Kiwanis Clubs

The 50/50 raffle at the Annual Meeting and the two (2) new memberships at the Kick-off Event were a success with a small profit of \$ 123.00 given to the WCTC Foundation Inc. towards student scholarships. LIRWC also saw the receipt of two Gift Certificates submitted for new members.

The individual SIGs hosted informational stations at the Kick-off Event which were very popular and assisted in the gaining of new members.

Two course catalogs, two BYTES Bulletins and two BYTES E-Blasts were created and sent to the membership this year. LIRWC was interviewed for an article in the local newspaper, *The Freeman*, and placed a small ad in the *50 Plus Resource Guide* as well as a quarter page and an advertorial in the *50 Plus NEXT* publication. A press release regarding the Annual Kick-off Event was submitted to local publications.

With a small grant from Enterprise Holdings LIRWC purchased a Meeting Owl in order to support outside locations in the Zoom options for classes which continued to be favored by members still concerned about attending classes in person since COVID.

Fairway Knoll and Shorehaven Senior Centers have participated in our community outreach efforts and participate in course offerings, but two other senior centers still have to develop a program with LIRWC.

The most exciting new program being offered our members is a new online registration system. After reviewing several options, it was decided to go with the WCTC Web Development group. Launch was targeted for fall 2022.

SPECIAL EVENTS COMMITTEE REPORT

The Special Events Committee gained five new members and was able to organize several very successful trips after two years of either no trips or only virtual tours. This past year generated trips to:

1. Lake Geneva Boat Cruise
2. Oshkosh EAA event Kohler Art Preserve



- 3. Marriott Theatre to see “Evita”
- 4. 3rd Annual Sock Hop.

Special Events Committee basically broke even for the year.

An aggressive calendar of events is planned for the coming year.

SPECIAL INTEREST GROUPS (SIGs) REPORT

Special Interest Groups (SIGs) experienced several ups and downs this past year. Singers lost most of its members but is still able to meet with a very small core group; Bridge and Theatre are missing Coordinators and are on hiatus; new Game Day and Recipe Trading SIGs were added with initial success; Creative Crafters was disbanded due to lack of continued attendance.

<i>SIG</i>	<i>Status</i>	<i>SIG</i>	<i>Status</i>
Singers	Active	Genealogy	Active
Sheepshead	Active	Book Lovers	Active
Bridge	Hiatus	Beading & Jewelry	Active
Theater Group	Hiatus	Hiking	Active
MAH-jongg	Active	Golf	Active
Creative Crafters	Disbanded	Philosophy	Active
Game Playing	NEW- summer '21	Recipe Trading	NEW

CURRICULUM COMMITTEE REPORT

The Curriculum Committee was very active in sourcing new community instructors and developing a program of offering shorter classes of 1-1/4 to 1-1/2 hours in lieu of offering only the standard 2-hour class and also more one-week versus six-week courses. In addition, they continued to offer hybrid courses, or combined in person and Zoom classes. Contact with other LIRs in the state showed all were experiencing the same issues in recovering membership and course levels from the COVID Pandemic.

Unfortunately, LIRWC lost one of its most prolific and favorite instructors and upon Don Rambadt’s death the committee had to deal with the eight courses left to complete or cancel.

The committee developed a new Evaluation Form for members to complete at the end of a class to document the level of success of the instructor and class material.

The WCTC print shop was consolidated with its graphics department giving LIRWC additional resources for printing and graphic support, including the ability to now be able to print the course catalog in four color.



LIRWC BOARD MEMBERS 2021-2022

Pam Erdmann, President 262-309-3162 cell perdmann@yahoo.com	Judy Pelt, Vice President 262-227-0416 cell judy.pelt@gmail.com
Dick Hoffmann, Treasurer (July '21- Sept '21) 262-617-1143 cell dhoffmann1@wi.rr.com	Robert Riedel, Acting Treasurer (Oct '21-Jun '22) 262-366-9293 cell riedelrk1220@gmail.com
Lisa Peterson, Past President 262-442-8989 cell ljpwalk@gmail.com	Secretary open
Sue Sullivan, Delegate-at-Large 262-798-9322 ssull28@gmail.com	Doreen Giesfeldt, Delegate-at-Large 414-828-1533 cell tdgiesfeldt@prodigy.net
Dave Arnott, Curriculum Chair 262-442-1779 cell darnott@wi.rr.com	Nancy Langlas, Special Events Chair 262-271-5801 cell Howdydog1@yahoo.com
Donna Homan, Membership (July '21- Feb '22) 262-389-9405 cell funsizedonna@gmail.com	Promotion Chair open
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