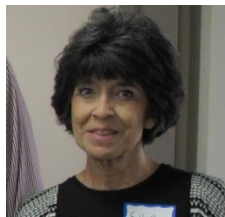




President's Message

By Ellie Monroe, President, OLLI-CSUF

HAPPY NEW YEAR to all!!!



We have successfully survived the past year of COVID-19. Unfortunately, it is harder to set New Year resolutions for OLLI as we face the new Omicron variant. Once again our resilient membership will be faced with a number of challenges in the New Year.

At this time the University will not allow us to hold in-person classes before February 7, and it's uncertain when we can. However, all online classes started January 18 as planned and will continue, plus classes that planned to be in-person-only are being offered online, if possible. New audiovisual equipment is in place that will improve the online class experience. We hope pandemic conditions will improve in the near future and allow us to commence our planned in-person spring classes on campus.

As we get updates from CSUF, we will notify all members through our email communications. Be sure you are receiving and opening your newsletters by email; this is our fastest method of getting information to you.

We still need to adhere to our current COVID-19 protocols to maintain the high level of safety we have committed to provide for our members. This means getting vaccinated, including the booster (new requirement), and continued masking indoors.

It was great to see all the activity and joyful faces back on campus this fall. Be sure to check out your spring Blue Book; you will find more classes are coming back to campus when pandemic conditions allow. We rely on the Blue Book, ChroniCLE and all OLLI publications to communicate with our members.

Take care and stay safe. See you soon! Cheers!!

Russell MacKeand

Mister Transitions in Retirement

By Russ MacKeand and Denny Bean, Staff Writer

Russ began his life in Toronto, Canada, and



moved to Vancouver before his family moved to Southern California and settled in Lynwood. He attended Lynwood High School and then went to Long Beach State College in pursuit of an engineering degree.

He switched his major to

Business Administration and pursued computer science at a technical institute. After he completed his Bachelor of Science in Business Administration he began work for Kaiser Permanente in technical positions and then progressed to senior management.

Russ met his future wife Young and they married while both worked at Kaiser in information technology. After 25 years at Kaiser, he moved on to Los Angeles County Office of Education where he finished his career as Director of Technology Services.

He was very active in youth basketball, serving on the Board for Fullerton National Junior Basketball (NJB) for over 20 years, coaching both of his daughters for over 10 years and serving as NJB Sectional Director for several North Orange County cities.

Russ was introduced to OLLI by George Killianey and his wife Jean, when they had Russ and Young attend some "Transitions in Retirement (TiR) Essentials" classes, which are open to the public on Saturday mornings. Russ joined OLLI in January of 2010 and soon took over responsibility as the program coordinator for the TiR Essentials

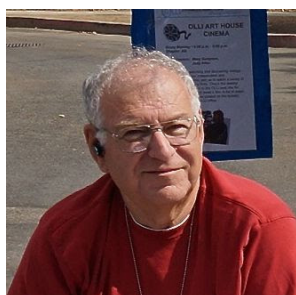
Russell MacKeand...Continued on Page 4

President. Ellie Monroe
 Vice President Administration Mike Stover
 Vice President Programs Renee Cabrera
 Vice President Communication Ginger Barnhart
 Vice President Membership Bill Sampson
 Vice President External Relations Susan Mullaly
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Desktop Publishing: Celia Reynolds
 Photographer: Donna Spradlin

Vice President Membership

By Bill Sampson, Vice President Membership



Bill Sampson will be starting his second year serving as OLLI's Vice President Membership in 2022. Bill has been a member of OLLI since 2019; he has previously volunteered on the Trips Committee, coordinating

trips to LAX airport, JPL, Hollywood Bowl and the Rose Parade Float Viewings, as well as also having served on the OLLI Board of Trustees as a Trustee at Large.

The Vice President Membership supervises the many volunteer teams that are involved in the hard work of putting the fall and spring membership and registration programs to life.

At the beginning of each semester letters are sent out to OLLI members giving them the information that they will need to renew their registrations for the upcoming term. Of the current 1100+ membership, about 25% need assistance to register online, and a team of volunteers from our

Registration and Technical Education Committees (TEC) are available to assist them in Room 20.

Our Docent Team is involved in our Open House programs where we can have over 150 visitors. It is our docents' pleasure to provide potential members with tours of the OLLI facilities.

There are many members to our Hosts Team. The Hosts Team greets our guests during the Fall Open House and the Spring Preview. They escort guests from the registration areas to the Docent Team, the Mackey Auditorium and other locations. This team also serves as ushers in assisting members to locate seats in Mackey Auditorium, keeping food areas clear and maintaining the line awaiting food service in the Shapiro Wing. They are the troubleshooters for these two annual events. They also take potential members for pictures. They are mindful of those who seem lost or confused and offer them advice or assistance.

The 90+ Team locates those members who have become honorary members as they reach this magic age. Members of this team personally invite our 90+ individuals to participate in the Spring Preview festivities. Sometimes, it takes a great deal of searching to locate these individuals. When located, they are asked about their membership, the kind of volunteering that they might have done at OLLI, and the preferred flavor the individual cake that they will be receiving at our Shapiro reception. If needed, transportation is arranged so they can attend the event.

The In Memoriam and Friendship Team gathers information on ill or deceased members. Get well cards are sent to those who are sick or injured, or those having surgery. Sympathy cards are sent to the families of those who have passed. Notices are sent out to OLLI members on the passing, and information on services held for these dear friends is also sent out. OLLI members and the families of those lost over the year are invited to attend the In Memoriam event held each year in April.

The Information Table Team is present in the Ruby Gerontology Center courtyard during the first weeks of the fall semester to assist new members in finding classrooms, answer questions regarding OLLI procedures or just get acquainted.

Bill Sampson ...Continued on Page 3

The Scholarship Committee is a group of very unique individuals. Through a process of application and interviews, this dedicated group of volunteers recommends scholarships for those who need assistance with OLLI membership costs.

The Volunteer Recognition Team is the group that organizes and presents the Volunteer Recognition Reception and Concert each spring to acknowledge the hours of volunteer service that these members provide to OLLI.

The OLLI Vice President Membership is involved with just about every aspect of dealing with OLLI membership. If you'd like to be a part of this dynamic group, please feel free to contact me at Olli.membership@gmail.com.

Beyond the IRA Qualified Charitable Distribution

By Hart Roussel, Senior Director of Planned Giving, University Advancement, CSUF

You may be familiar by now with the advantage of making charitable gifts from the required minimum distribution (RMD) of your traditional IRA to avoid income taxes by making gifts directly to charity, like OLLI-CSUF and the Cal State Fullerton Philanthropic Foundation. The **IRA Qualified Charitable Distribution (QCD)** allows individuals age 70½ or older to make **an outright gift of as much as \$100,000 annually** to a qualified public charity from a **traditional IRA**. The QCD withdrawal amount counts toward your annual RMD and would not be a part of your ordinary taxable income. A couple can give up to \$200,000 as a QCD.

What if you have other types of qualified retirement accounts like SEP-IRA, SIMPLE IRA, 401(k) and 403(b) accounts? May these be used in the same way? The short answer is "No," but the longer answer is "Yes, there's a way to do that."

It is possible to use a SEP-IRA or SIMPLE IRA for a QCD. However, there are certain conditions that need to be met to make them eligible for QCDs. The SEP-IRA or SIMPLE IRA cannot be "ongoing," which is still receiving contributions from a self-employed individual or small business

employee in the year they want to make a QCD. So if the SEP-IRA or SIMPLE IRA is inactive (has received no new contributions) for the year in which the QCD is made, it can qualify for a QCD. When those conditions are met, the normal QCD rules apply.

The other option for a SEP-IRA or SIMPLE IRA is to convert them into a traditional IRA, then the normal QCD rules apply. For 401(k) and 403(b) accounts, the only way currently available to make them eligible for QCDs is to convert them into a traditional IRA account. Legislation has been introduced in Congress to make these other types of retirement accounts eligible for QCDs, but for the time being, only traditional IRAs can be used for QCDs.

Lastly, every type of qualified retirement account can be given to charity by beneficiary designation. Qualified retirement accounts passed to non-spousal heirs may be subject to forms of double taxation. In almost every case, it is more tax efficient to donate the remainder of your qualified retirement account to charity and pass on other assets to non-spousal heirs.

As always, this information is not intended as legal or tax advice. Please consult your professional advisors for legal and tax guidance.

Planned Gifts to support OLLI-CSUF are coordinated through University Advancement. Please visit www.csufplannedgift.org or contact us to learn about all of the benefits of making a charitable bequest and how it can help OLLI-CSUF continue our important work. If you're interested in establishing your legacy and making a lasting impact at OLLI-CSUF through membership in the [Ontiveros Legacy Society](#), please contact our Office of Planned Giving at 657-278-3947 or CSUFPlannedGift@fullerton.edu.

Get the Calendar from the Office

The monthly Calendar is no longer distributed with the ChroniCLE. Drop by the OLLI office for a hard copy or call (657-278-2446) or email (olli-info@fullerton.edu) the OLLI office for an electronic copy, which is now updated throughout the month.

Save the Date

Spring Hospitality Event

Saturday, March 12

While the 2021-2022 winter has been very chilly, the OLLI Hospitality Committee is looking forward to a warm and sunny spring. Please join your OLLI friends to help smile-in the spring awakening; leprechauns may also help out ... a rainbow ending in a Ruby Gerontology Center pot of luck and gold, perhaps.

Mark your calendars for Saturday, March 12!

Watch the OLLI Announcements & Events Newsletters for further details.

Get it From the Source

By Chris Shaw, Editor

Would you like to know more about what's going on at OLLI? Do you have a specific question about OLLI?

OLLI President Ellie Monroe hosts the OLLI Coffee Hour once a month via Zoom to provide members with information from the latest Board meeting. She shares the latest campus COVID-19 guidelines and responds to questions about OLLI operations or other concerns and suggestions. The OLLI Coffee Hours have an informal format and are open to all OLLI members. These meetings are usually held the Monday following each meeting of OLLI's Board of Trustees, but times and dates may vary. Watch for OLLI emails announcing these meetings and Zoom links.

Need answers now? Send an email to Chris Shaw at tashawc01@gmail.com with your question. I will find the right person to get the right answer for you. I'll also share your question and answer in the next ChroniCLE, because if you wondered about something, other OLLI members may have wondered the same thing.

The Board of Trustees meets the second Thursday of each month. All OLLI members are welcome to attend as guests. If you have a question or issue to raise at the Board meeting, it must be submitted in advance to President Ellie Monroe at ellie.monroe@mindspring.com. You can find the Zoom link from the Class Information and Updates Newsletter emailed to all members, or get it on the OLLI website.

Russell MacKeand ...Continued from Page 1

course after encouragement from Jim Kashiwada.

During his 12 years overseeing TiR Essentials, this program has offered over 250 classes and four full-day "Retirement Boot Camps." The Boot Camp, attended by over 200 in each class, was conceived by Mike Stover to help increase membership. Key contributors to the TiR program have been lead coordinators Mike Stover, Jim and Ellie Monroe and Joyce Ono who all became OLLI Presidents.

Russ is the chairperson of the Transitions in Retirement Committee. The TiR Committee focuses on developing programs and activities for OLLI members who are still working part-time or are recently retired. Russ recognizes that prospective members joining OLLI may have a different outlook on retirement than that of previous generations. Anyone interested in joining the committee or just have an idea for a course may attend the TiR Committee meeting on March 14 at 3:30 p.m. via Zoom or contact Russ at rmackeand@yahoo.com.

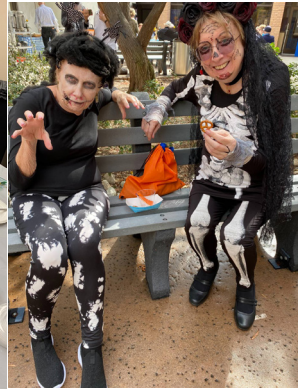
After attending the "Life Story Workshop" course for five years, Russ became one of the coordinators in 2018 with Alice Gresto and Kathy Collier. This course continues to be popular and has an ongoing waiting list. Russ provides technical support, including the course's migration to Zoom, as well as communication to the class members.

He has been active in the photo selection process for the Blue Book and Open to the Public Gatefold Brochure and worked with Jim Cennane and Chris Shaw to establish the Photo Resource Committee to develop a better photo archive process. For the past six years, he has been the editor for the Open to the Public Gatefold Brochure.

At the end of 2017, his wife Young retired from singing with the Pacific Chorale and then brought her singing talents to OLLI to perform in concerts, form a caroling quartet and sing at the OLLI Holiday Luncheon.

Russ enjoys friendships with OLLI members and volunteering at OLLI.

Oktoberfest



What's Happening at the Board

By Chris Shaw, Editor

OLLI's Board of Trustees met on November 18 and December 9. Following are highlights from those meetings:

- About 82% of OLLI members have completed the required online report of their vaccination status.
- CSUF continues to extend its masking mandate indoors, currently through the end of January.
- Spring Blue Books will be mailed to all members in addition to the emailed digital copies.
- Printed copies and digital copies of the spring TiR Open to the Public Brochure will be used to publicize OLLI's programs to the public to recruit new members.
- The Policies and Procedures Committee is reviewing the policy on offering Collaboration programs dealing with student service learning and collaboration with organizations external to CSUF.
- 2022-2023 budget planning begins in February.
- Long-time OLLI instructor Judge Cardenas will be lauded at the Volunteer Recognition Event.
- Program streaming host was moved from YouTube to Vimeo to improve service.
- Roz Charles is adding Instagram and LinkedIn to Facebook as OLLI's participation in social media.
- Mackey Auditorium will be unavailable for classes during summer 2022 while CSUF upgrades its audiovisual systems.
- Ying Lu was hired to fill the open position in the OLLI office.
- VP Facilities Tony Package is planning to replace the eight-year-old tables in the courtyard.
- President Ellie Monroe is continuing monthly OLLI Coffee Hour meetings via Zoom to keep members informed and answer their questions. They have been well-attended.
- The Rose Parade Float Viewing trip was canceled due to insufficient number of registrations.

“Tough times never last, but tough people do”

Blue Book's Index by Date Redesigned

By Chris Shaw, Blue Book Editor

Starting with the spring 2022 Blue Book, a Day of the Week Index (see Page 70 in the spring Blue Book) will replace the Index by Date that had been included at the back of each Blue Book.

The new design focuses on the days of the week, listing the classes and events offered each day and which recur throughout the semester, instead of showing a listing for each day of the semester as in Index by Date. The first programs shown in the index begin with those offered on Mondays, followed by Tuesday, etc. By example, Monday's list is divided into programs offered every Monday; then programs offered every other Monday; then programs offered on Mondays non-routinely (other schedule). Programs offered every other week are staggered, so that one set of programs starts on Monday of the first week of the semester (alternate week 1) and the other set of programs starts on Monday of the second week of the semester (alternate week 2). They alternate every other week. All the class meeting dates are shown in one place under the day it meets and include exceptions, such as holidays.

The Day of the Week design eliminates the redundancy of listing programs over and over again for each day. In fact, the new design reduced the length of the index from 24 to nine pages. The old Index (by Date) was very labor intensive to produce and time-consuming to proof. The new design saves hours of time and effort by EIP-CSUF designers in addition to OLLI's Blue Book editing team.

Where's the Link? We can't show Zoom links in the Blue Book, because it is distributed to the public. When COVID-19 forced OLLI to convert its programs to Zoom, Ginger Barnhart designed a program listing to enable members to quickly find the Zoom links to programs, which is now a standard listing attached to the weekly OLLI Class Information and Updates Newsletter. Members have found the format of this listing to be easy to use, so we adopted the Zoom listing's format for the new Day of the Week Index.

Blue Book's ...Continued on Page 7

Blue Book's ...Continued from Page 6

Two other indexes in the front of the Blue Book with page numbers for the full program descriptions remain unchanged—Areas of Study/Programs, listing all programs in the order they appear in the Blue Book, and Index of Classes/Programs (alphabetical), listing all programs in alphabetical order. The page numbers in these two indexes are hyperlinked to their program descriptions' page for quick, one-click access in the digital version of the Blue Book.

Remember, it's always a good idea to verify the latest class schedule information in the Day of the Week Index. Dates, times and places of classes and events are subject to change or cancellation throughout the semester. Go to the OLLI website at <http://olli.fullerton.edu> and select the CALENDARS tab or check the monitor in the Shapiro Wing lobby for daily-updated information.

Day of the Week Index



Verify Latest Information

Dates, times and places of classes and events are subject to change or cancellation. Access the OLLI website at <http://olli.fullerton.edu> and select the CALENDARS tab for up-to-date information.

*Asterisk indicates courses that are open to the public.

Monday: Every Week

January (17 no class), 24, 31 • February 7, 14, (21 no class), 28 • March 7, 14, 21, (28 no class) • April 4, 11

French 2 • 8:45 a.m.-9:45 a.m. • Room 21

Tai Chi • 9 a.m.-10 a.m. • TBD

Bridge, Duplicate • 9:30 a.m.-noon • Shapiro ABCD

Also meets Intersession: April 18, 25 • May 2, 9, 16, (23 no class)

CLECAT Club • 12:15 p.m.-1:15 p.m. • Room 21/Zoom/Stream

Ukulele: Intermediate • 1:15 p.m.-2:45 p.m. • Zoom

Also meets Intersession: April 18, 25 • May 2, 9, 16, (23 no class)

Exploratory Discussion • 1:15 p.m.-3:15 p.m. • Shapiro CD/Zoom

Meditation for Everyday Life • 3:15 p.m.-4:30 p.m. • Room 18

Also meets Intersession: April 18, 25 • May 2, 9, 16, (23 no class)

Spanish 4 • 1:30 p.m.-3:30 p.m. • Room 21

Ukulele: Symposium • 3:30 p.m.-5 p.m. • Shapiro CD/Zoom

Also meets Intersession: April 18, 25 • May 2, 9, 16, (23 no class)

Ukulele: Beginner • 3:30 p.m.-5 p.m. • Shapiro AB/Zoom

Also meets Intersession: April 18, 25 • May 2, 9, 16, (23 no class)

Yoga for the Rest of Us • 4:45 p.m.-6 p.m. • Room 18

Also meets Intersession: April 18, 25 • May 2, 9, 16, (23 no class)

Piano Keyboard • 5:15 p.m.-6:30 p.m. • Zoom

Art House Cinema • 5:45 p.m.-8 p.m. • Shapiro CD

Special Events

Events Requiring Registration

Spring Hospitality Event

Saturday, March 12 • Ruby Gerontology Center

Time and theme are to be determined.

Watch the weekly newsletters for details including the registration date.

No Registration Required

OLLI Social

January 27 • 3-5 p.m. • Cancelled

OLLI Social

February 24 • 3-5 p.m. • Shapiro/Zoom

Watch for details in the weekly newsletters.

Coming Up

(dates subject to change)

Volunteer Recognition • April 3

In Memoriam • April 8

General Meeting/Election • April 21

Alaska Cruise • August 17-30

More Information

Flyers and sign-up coupons for events requiring registration will be available in the OLLI office, and on the OLLI website at <http://olli.fullerton.edu> under "CLASSES/ ACTIVITIES" - "OLLI EVENTS" or "DAY AND OVERNIGHT TRIPS."

Welcome Ying Lu

Back to the OLLI Office

Many OLLI members will know Ying Lu, who worked in the OLLI office from September 2014 to March 2019. Well, thank goodness, she's back!

Ying left OLLI to complete her education, and now she has graduated from Cal State Fullerton with a bachelor's degree in accounting.

She is the OLLI office's Accounting Assistant, responsible for accounting of revenue, expenses and financial reports. OLLI's officers and others know that any of OLLI's expenses they are responsible for paying must be preapproved by CSUF in order to qualify for payment or reimbursement. Please contact Ying or her manager, Patsy, for details.

Ying told me she always enjoyed her job here, so she was happy to come back. "People at OLLI are really nice," she said.





OLLI

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Not Receiving OLLI Emails?

If you have unsubscribed in response to **any** OLLI email, you have unsubscribed from **all** OLLI emails. If, for any reason, you are **not** already receiving OLLI emails about upcoming classes, events and special notices, you can subscribe (or re-subscribe) by going to <http://tinyurl.com/olliEmailSignUp> and entering your email address, first name and last name.

If you still have trouble receiving emails from OLLI, send an email to ollinewsbytes@hotmail.com and include your name and email address.



How to Get the ChroniCLE by Email - Save Trees and Stamps!

Unless you elected not to receive emails from OLLI, you are currently receiving an email each month announcing the new ChroniCLE and calendar for the upcoming month with links to view or download the publications. You can also access the most recent ChroniCLEs and calendars through links in the weekly OLLI News Bytes and on the OLLI Website.

If you are receiving the ChroniCLE in the mail, but no longer want it mailed to your home, send an email to olli-info@fullerton.edu with **your name and address** stating: "Do **not** send me a ChroniCLE in the mail." If you ever need the printed version, copies are always available in the OLLI office.

If you Need to Contact OLLI

Website: <http://olli.fullerton.edu>

Email: olli-info@fullerton.edu