Channel Islands
CALIFORNIA STATE UNIVERSITY

OSHER LIFELONG LEARNING INSTITUTE

Organizational Guidelines for OLLI at CSU Channel Islands

Purpose
The purpose of this document is to define the relationship between the Osher Lifelong Learning Institute (OLLI) at California State University Channel Islands (CSUCI) and its host institution, the various roles of community stakeholders, and the goals and guidelines of the Institute.

Background
Founded in 2004, the Osher Lifelong Learning Institute is an Institute of CSU Channel Islands, offering non-credit courses and educational activities to adults aged 50 and above.

OLLI is housed within CSUCI Extended University in the Division of Academic Affairs. OLLI is an approved institute and is governed by the policies and guidelines set forth for CSUCI Centers and Institutes (SP.14.018). As an endowed grantee of the Bernard Osher Foundation, OLLI at CSUCI follows the funding and operating guidelines of the Osher Foundation. CSUCI is responsible for all legal, financial, and liability risk associated with the program.

Constraints
OLLI shall adhere to all administrative, financial, and operational policies as set forth by the California State University; California State University Channel Islands; and CSU Channel Islands Foundation.

The membership lists and personal information, including names, addresses, phone numbers, and e-mails shall not be used for non-organizational related activities.

OLLI shall not be used to sell or promote products or services, or to generate client lists.

OLLI shall not support or oppose any political party, political positions, candidate, or political issue.

This document will be reviewed and updated as necessary to ensure compliance with the guidelines set forth by the Osher Foundation and CSUCI.

Applicability
Faculty, staff, members and partners of OLLI at CSUCI.

OLLI Program Staff
The OLLI Program Staff manages OLLI at CSUCI and reports directly to the Dean of Extended University/AVP for International Programs.

The OLLI Program Staff are employees of CSU Channel Islands, and the official job duties are determined by the Dean of Extended University/Associate Vice President for International Programs. The official job descriptions are on file in the Dean's office.

The OLLI Program Staff are the University representatives for the OLLI program and shall promote the program within the University and within the broader community.

Channel Islands
CALIFORNIA STATE UNIVERSITY

OSHER LIFELONG LEARNING INSTITUTE

Organizational Guidelines for OLLI at CSU Channel Islands

The OLLI Program Staff works to communicate effectively with the OLLI members and to meet the needs and expectations of the OLLI membership within the fiscal, physical, operational and policy limitations of the University and OLLI program.

The OLLI Program Staff, as University employees, are ultimately responsible to the University and the Osher Foundation for all aspects of the OLLI program at CSUCI.

OLLI Member

OLLI membership is intended for and designed to be open to anyone 50 years of age or older. Spouses or Domestic Partners of current members, including those under the age of 50, are eligible for membership.

A person becomes an OLLI member by paying an annual (academic calendar year) membership fee. Upon payment of the annual membership fee, a member is eligible to enroll in all OLLI courses, classes or events – which could have associated fees. OLLI-sponsored programs and activities are limited to OLLI members, who may be accompanied by an immediate family member on a space-available basis.

The University does not classify OLLI members as "students". OLLI members are expected, however, to become aware of, and abide by the CSUCI Student Code of Conduct. Individuals failing to abide by the guidelines set forth in the Code of Conduct may be asked to leave the OLLI program.

The University may offer certain privileges to OLLI members, like library use or ID cards. However, there may be additional fees to the University.

Qualified individuals with a need for a disability related accommodation shall not be excluded from participation in OLLI or be denied the benefits, services, programs, or activities of OLLI because of their disability. Members with a need for a disability related accommodation are encouraged to contact the OLLI Program Staff.

OLLI Curriculum

OLLI courses are non-credit with no homework, tests, required books, or grades. Courses require no pre-requisites for registration.

As a benefit of membership, OLLI members may participate in educationally enriching activities outside of the classroom, including but not limited to trips, social events, tours, etc. "OLLI-sanctioned" activities or events must be approved by the OLLI Program Staff.

All OLLI session dates will comply with the CSUCI academic calendar, including University holidays and closures. During each academic year, OLLI currently has three eight-week sessions with varying length courses and two TASTE of OLLI sessions with multiple two-hour lectures.

Organizational Guidelines for OLLI at CSU Channel Islands

OLLI Instructors
Courses are taught by instructors who have special knowledge, background, or skills in the topics they teach. All instructors are expected to adhere to the mission, policies, procedures, and codes of conduct set forth by CSUCI.

All potential instructors must submit a course proposal in response to a request for proposal in order to be considered for a given session. Potential instructors are recommended by the Dean of Extended University to the Provost who makes the selection. Selected instructors are hired under contract with Extended University and are paid per the appropriate CSU salary schedule in accordance with CSUCI policy.

OLLI Advisory Council of Volunteers
The OLLI Advisory Council of Volunteers (the Council) works with the OLLI Program Staff to evaluate the effectiveness of the OLLI program.

The Council shall be comprised of a Chairperson, a Vice-Chairperson, the Chairs of the standing teams, two individuals appointed by the Dean, and one OLLI Program Staff. Initially, the standing teams will be Curriculum, Membership, Fundraising & Finance, Communications, Events, and Volunteer Coordination – with functions described below.

The Council provides analysis and options on future directions of the OLLI Program, reflecting the standing teams' work and the Council's view of OLLI members' issues. The Council does not vote on recommendations. The OLLI Program Staff reviews the Council analysis and responds back to the Council with feedback. The OLLI Program Staff takes the Council analysis into consideration in determining program decisions.

The Council Chairperson will serve a term of two years. The Council Vice-Chairperson will serve a two-year term as "chair-in-training" before becoming Chairperson. A Council Vice-Chairperson shall succeed to the designated Chairperson position upon a successful confirmation vote of the OLLI membership, as described below, and expiration of the Chairperson's term of office, or due to a vacancy in that office. If the Council Vice-Chairperson loses the confirmation vote, the Dean may extend the term of the Chairperson for one more term or appoint a new Chairperson from qualified persons.

Team Chairs will serve a term of two years. Team Chair-Elects will serve a two-year term as "chair-in-training". A Team Chair-Elect shall succeed to the designated Team Chair position upon a confirmation vote by the OLLI membership and expiration of the Team Chair's term of office, or due to a vacancy in that office. If the Team Chair-Elect loses the confirmation vote, the Dean may extend the term of the Team Chair for one more term or appoint a new Team Chair from qualified persons.

The Council shall meet approximately monthly. The Council Chairperson will lead Council meetings; the Vice-Chairperson will perform the duties of the Chair in his/her absence. The Chair of the Communications Team will take minutes of all Council meetings and will provide approved minutes to the OLLI Program Staff. The regularly scheduled meetings of the Council will be held in a format

consistent with Robert's Rules of Order. Six Council members will be considered a quorum. In the event that a Team Chair cannot attend a meeting, the Team Chair-elect will fill in for the Chair.

The OLLI Program Staff, in consultation with the Council, shall determine the need for, and duties of, new standing or temporary ad-hoc teams.

OLLI Elections

The OLLI membership will vote in April for persons to fill anticipated vacancies for Council Chairperson, Vice-Chairperson, Team Chairs and Team Chair-Elects. Incoming Council members will be installed at the May Council meeting.

The terms of office of the Chair-Elects will be staggered to preserve continuity of the Council over time. Chairs and/or Chair-Elects will begin their tenure June 1.

An elected Council member may be removed by two-thirds of voting OLLI members in a special election, which will be run by the OLLI Program Staff in consultation with the Council.

A Council member who misses more than two Council meetings within a year without notice will be considered to have resigned.

The OLLI Program Staff, in consultation with the Council, will make appointments to fill any unfilled Council vacancies until the following annual election.

Individuals may be nominated, or can nominate themselves, during an open call for nominations in March. Candidates must be qualified to serve in the positions on the Council, as described below. During the campaign all candidates must demonstrate a commitment to service, diversity, equity, and inclusion.

For Council Chairperson or Vice-Chairperson, the candidate must have been in the OLLI program for at least two years and been active on one OLLI standing team for at least two years. Candidates for Chairperson or Vice-Chairperson will be vetted by the OLLI Program Staff. For a Team Chair or Chair-Elect, the candidate must have been active on that standing team for at least one year. Candidates for Team Chair or Chair-Elect will be vetted by the Council.

Qualified candidates will be placed on a ballot distributed to the OLLI membership by OLLI Program Staff. The individual receiving a majority of the votes cast for the specified Council or Team positions is elected. If no one receives a majority, the top two candidates will have a run-off election.

If there are no qualified candidates for a position, the OLLI Program Staff, in consultation with the Council, will make appointments to fill the positions until the next election.

Channel Islands
CALIFORNIA STATE UNIVERSITY

OSHER LIFELONG LEARNING INSTITUTE

Organizational Guidelines for OLLI at CSU Channel Islands

OLLI Teams
OLLI Teams will coordinate their work through the Council and work with the OLLI Program Staff to accomplish the following:

Curriculum Team:

- Maintain a list of people who may be potential OLLI instructors
- Seek new OLLI instructors
- Assess potential instructors fit for OLLI program
- Propose courses for Fall, Spring I and Spring II sessions and classes for TASTE sessions
- Propose course schedules for each session and TASTE session
- Plan for the long-term curriculum growth and development
- Seek novel ways for OLLI members to take OLLI courses, e.g., online courses

Membership Team:

- Provide outreach to recruit new OLLI members, e.g., through tabling activities, and expand the diversity and inclusivity of OLLI membership
- Identify new opportunities to engage potential OLLI members
- Contact and speak to service clubs, retired-member groups, and community organizations
- Conduct orientations for new OLLI members
- Help the Events Team with events to retain current members
- Survey OLLI members to obtain information useful for planning future OLLI programs
- Contact former OLLI members to solicit feedback on reasons for not continuing with OLLI

Fundraising & Finance Team:

- Adhere to CSUCI, University Advancement, and CSUCI Foundation fundraising and constituent data policies, protocols, and procedures
- Propose an annual budget and fundraising goals
- Review the expenditures vs. budget
- Under the guidance of the University Advancement staff, help to conduct annual fund drives
- Coordinate with University Advancement to identify and pursue new sources of funding for OLLI
- Develop criteria to select OLLI recipients for financial assistance in the OLLI program

Communications Team:

- Review monthly the OLLI websites for errors, omissions or updates
- Prepare and distribute a monthly newsletter for OLLI members
- Help design the OLLI catalogs of courses and distribute it throughout the community
- Improve OLLI presence on social media
- Design publicity campaigns for OLLI courses and events

Organizational Guidelines for OLLI at CSU Channel Islands

- Submit requests to Communication & Marketing for news releases written and distributed to news media by Communication & Marketing staff
- Take photos and testimonials at activities and events and archive them for future use
- Recruit ambassadors for OLLI courses and provide them weekly information for dissemination
- Ensure that the University's Identity Style Guidelines are adhered to for all OLLI marketing

Events Team:

- Plan, organize, market and facilitate educationally enriching activities outside of the classroom
- Adhere to CSUCI's policies, protocols, and procedures for any events taking place on campus
- Conduct a summer seminar for OLLI and the community
- Plan and organize bus and self-drive trips to local or regional places of interest
- Plan and organize international travel programs
- Plan social events to engage OLLI members and to thank OLLI volunteers
- Conduct service projects to help CSUCI student or people outside OLLI
- Encourage OLLI individuals to form special-interest groups open to all OLLI members, like book, food or film clubs

Volunteer Coordination Team:

- Maintain lists of active OLLI volunteers and people interested in becoming OLLI volunteers
- Assure that every OLLI volunteer signs the CI volunteer forms annually
- Help other teams identify specific volunteer tasks and opportunities
- Help OLLI members find appropriate volunteer opportunities
- Work to expand the volunteer ranks within the OLLI community
- Work with the Communications Team to promote volunteer opportunities
- Assess annually the health of the OLLI volunteer program, e.g., through annual surveys

OLLI Volunteers

The University is committed to providing significant opportunities for OLLI volunteer engagement and leadership. OLLI volunteers must adhere to the CSU Volunteer Document (HR 2015-10) and the CSU Volunteer Handbook.

OLLI members who are doing specific functions for the OLLI program are University volunteers, including team Chairs and team members.

Annually Team Chairs will submit a list of OLLI volunteers on the team to the OLLI Program Staff for University approval.

Team Chairs are responsible for: communicating and collaborating with fellow team chairs and OLLI Program Staff; coordinating volunteer team member activities; leading team meetings; providing a written report of activities for Council meetings; developing and maintaining team operational

procedures; coordinating logistics at monthly team meetings; maintaining updated lists of OLLI volunteers; and recruiting new volunteers.

Team Chairs should work to balance experience and innovation by promoting turnover in the team over years.

Team Chairs, in conjunction with the OLLI Program Staff, will assign specific work to OLLI volunteers that begins on an agreed upon date and ends upon completion of the assignment.

New volunteers will attend an orientation by OLLI Program Staff. All volunteers will submit annually a "Volunteer Designation Form" and an "Identified Risks of Participation Form" that will be kept on file with the University.

The University shall commit sufficient resources for effective management, training, and supervision of OLLI volunteers according to University guidelines (https://www.csuci.edu/rm/programs/volunteers.htm).

OLLI volunteers may not commit the University in any manner or form. The volunteers do, however, represent the University to the public and must maintain the highest decorum and personal standards.

Volunteers who do not meet the University standards will be counselled and may be released from their duties.

Volunteers will work through the OLLI Program Staff to request information or actions of University employees. OLLI Program Staff may ask an OLLI volunteer to communicate with a University employee on an issue. Volunteers will respect the time of University employees. OLLI Program Staff will have regularly-scheduled office hours for OLLI members to discuss any OLLI issues.

OLLI volunteers shall communicate inclusively, positively, collegially, and collaboratively with fellow volunteers and University staff.

Transition

Team Chairs and volunteers will continue to serve in their current capacity until replaced through the process outlined in this policy. Election of Council members and formation of the Council following the expressed intent of this document will be done as soon as possible after the Dean has signed this document. For the initial elections, the Dean may wave eligibility requirements for specific positions.

Osman Özturgut, Ph.D.
Dean and Associate Vice President for
Extended University and International Programs