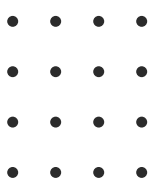




Osher Lifelong Learning Institute
at CSU Channel Islands



OLLI at CSUCI

Organizational Guidelines



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Purpose

The purpose of this document is to establish a set of organizational guidelines that define the roles, responsibilities, and procedures of the Osher Lifelong Learning Institute (OLLI) at California State University Channel Islands (CSUCI) and its participants. These guidelines provide a framework for fostering a positive and inclusive environment, promoting effective communication, and ensuring the successful achievement of OLLI's goals and objectives.

In addition, this document outlines the relationship between OLLI and its host institution, California State University Channel Islands (CSUCI), and establishes the collaborative nature of their partnership. It details the shared responsibilities, expectations, and resources that both entities contribute to support the growth and success of OLLI as a valuable community resource.

Furthermore, this document articulates the mission and vision of OLLI at CSUCI, providing a compass for decision-making and program development.

Finally, this document establishes guidelines for effective communication and collaboration within the OLLI community. These guidelines aim to promote transparency, inclusivity, and a sense of belonging among all members of the OLLI community.

Mission

OLLI at CSUCI is dedicated to enriching the lives of lifelong learners by providing opportunities for intellectual stimulation and social connection designed for adults aged 50 and above. We foster a love of learning through university-level courses, social & educational activities, and special events.

Vision

The power of curiosity and the joy of discovery have no age limits. We aim to cultivate a vibrant community of lifelong learners through an expansive range of educational experiences, both within and beyond the classroom. Our motto is: OLLI is the Joy of Learning.

Background

Founded in 2004, the Osher Lifelong Learning Institute is an Institute of CSU Channel Islands, offering non-credit courses and educational activities designed for 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 is a living document that will be reviewed and updated as necessary to ensure compliance with the guidelines set forth by the Osher Foundation, Osher National Resource Center (NRC) and CSUCI.

OLLI Program Staff

The OLLI Program Staff manages OLLI at CSUCI and reports directly to the Dean of Extended University and Digital Learning.

The OLLI Program Staff are employees of CSU Channel Islands, and the official job duties are determined by the Dean of Extended University and Digital Learning. 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.

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 members, including those under the age of 50, are eligible for membership. Membership fees are a requirement of the Osher Foundation.

A person becomes an OLLI member by paying an annual membership fee. The annual membership fee is paid before the first session of courses an individual enrolls in within an academic calendar year (Fall, Spring, or Summer), with the academic year beginning in Fall. 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.

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.

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 Member Benefits

OLLI Members are entitled to the following program benefits:

- Eligibility to attend our class sessions
- Access to recorded classes
- Eligibility to attend local and international travel trips
- Invitations to social events
- Eligibility to purchase a student ID that gives access to free bus usage, access to the CSUCI library, and discounts at theaters

OLLI Curriculum

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

All OLLI session dates will comply with CSUCI holidays and closures. During each academic year, OLLI offers four six-week sessions of two-hour courses and one Summer TASTE of OLLI session with multiple, one-time, two-hour lectures.

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 and OLLI at CSUCI.

All potential instructors must submit a course proposal in response to a request for proposals in order to be considered for a given session. Potential instructors are recommended by the Curriculum Committee and approved by the OLLI Program Staff. Selected instructors are hired as Vendors with Extended University and are paid in one lump sum following the end of a teaching assignment. The information needed to include new vendors in the vendor database can be completed with the Vendor Data Record Form 204. This form is required by the State of California so that the University's Accounts Payable department is authorized to pay an invoice. The Form 204 is similar to the W-9 tax form used by private industry. Instructors who are CSU Channel Islands faculty are paid via a Special Consulting contract.

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 and provides program recommendations for OLLI Program Staff to consider in making program decisions. The Council shall be composed of a Chairperson and the Chairs of the standing teams, two individuals appointed by the Dean, and one OLLI Program Staff.

The responsibilities of the Chairperson include the following:

- Lead Advisory Council meetings
- Serve as a liaison between Team Chairs to ensure intergroup cohesion and alignment with broader program goals
- Lead individual meetings with volunteer teams
- Support growth of volunteer base

Currently, the standing teams are Curriculum, Membership, Fundraising & Finance, Communications, Events, and Volunteer Coordination, with functions described below.

The Council as a whole provides analysis and options on future directions of the OLLI Program. 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 account when determining program decisions.

The Council recognizes that the OLLI Program Staff may reach a decision that does not align with a Council recommendation. In this event, OLLI Program Staff will inform the Council of the final decision and provide reasoning behind it.

OLLI Advisory Council Terms

The Council Chairperson and Team Chairs will serve a term of two years within the current role.

The Council shall meet approximately monthly. The Council Chairperson will lead Council meetings. In the event that a Team Chair cannot attend a meeting, the Team Chair will select a team member to attend as a representative.

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 Advisory Council Nominations

Candidates for the roles of Chairperson and Team Chairs can be nominated by OLLI Members, Volunteers, and Staff according to the following guidelines. Individuals must be qualified to serve in the positions on the Council and be able fulfill the associated responsibilities. During the election process all candidates must demonstrate a commitment to service, diversity, equity, and inclusion.

For Council 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 will be vetted by the OLLI Program Staff. For a Team Chair, the candidate must have been active on a standing team for at least one year.

If there are no nominations or 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.

OLLI Advisory Council Elections

Elections will be held yearly for positions in which terms are ending. The OLLI membership will vote for persons to fill anticipated vacancies for Council Chairperson and Team Chairs. Incoming Council members will be installed at the Council meeting.

The terms of office of the Chairs will be staggered to preserve continuity of the Council over time. Chairs will begin their tenure once they have been elected.

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.

OLLI Teams

OLLI Teams are composed of a Team Chair and a committee of team members. OLLI Teams will coordinate their work through the Council and work with the OLLI Program Staff to accomplish the following:

Curriculum Team:

- Seek new OLLI instructors (inside/outside Ventura County).
- Recommend instructor selection criteria and assess potential instructors' fit for OLLI program.
- Send Instructor's Handbook to new instructors.
- Maintain instructor database.
- Meet before each term to review instructor proposals.
- Recommend courses and propose schedules for Fall and Spring sessions and Summer TASTE
- After consultation with Staff, will inform instructors of class acceptance/rejection and work out a schedule.
- Edit instructor bios and course descriptions for course catalog, review for errors.
- Provide feedback to instructors after staff provides evaluation data.
- 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
- Distribute course catalogs throughout our local counties
- Identify new opportunities to engage potential OLLI members
- Contact and deliver presentations on OLLI Program to service clubs, retired-member groups, and community organizations
- Conduct orientations for new OLLI members
- Help the Events Team with events to recruit new and 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
- Review annual budget prepared by OLLI Program Staff
- Review the expenditures vs. Budget utilizing CSUCI OLLI Dashboard
- Conduct fund drives for OLLI Program needs under the guidance of University Advancement
- Identify and pursue external sources of funding in coordination with University Advancement
- Work with the OLLI Director and University Advancement to apply for and track expenditures for Osher Grants as available
- Recommends criteria for OLLI recipients of financial assistance in consultation with OLLI Program Staff

Communications Team:

- Review monthly the OLLI websites for errors, omissions or updates
- Prepare and forward to OLLI Program Staff a bi-monthly newsletter for OLLI members to be distributed via email and posted on the OLLI website
- Design publicity campaigns for OLLI courses and events
- Take photos and testimonials at activities and events and archive them for future use

Events Team:

- Plan, organize, market and facilitate educationally enriching activities outside of the classroom in consultation with OLLI Program Staff
- Adhere to CSUCI's policies, protocols, and procedures for any events taking place on campus
- Plan and organize bus and self-drive trips to local or regional places of interest in consultation with OLLI Program Staff
- Plan and organize international travel programs in consultation with OLLI Program Staff
- Plan social events to engage OLLI members and to thank OLLI volunteers in consultation with OLLI Program Staff
- Conduct service projects to help CSUCI students or people outside OLLI
- Encourage OLLI individuals to form special-interest groups open to all OLLI members

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 both in person and on Zoom
- Speak with OLLI members to help find volunteer opportunities that meet their interests
- Recruit ambassadors for OLLI courses.
- Assess annually the health of the OLLI volunteer program, e.g., through annual surveys

OLLI Ambassadors

OLLI Ambassadors are volunteers who provide classroom support, in-person and/or on Zoom. Such duties include the following:

- Contact the instructor before class or arrive early to learn how the instructor wants to handle questions and comments (i.e. raise hand, Zoom chat, unmute, save questions for end of class, etc.)
- Introduce the instructor on the first day of class
- Welcome students at the beginning of each class
- Provide general class reminders (for example, turn off cell phones, mute mic and use chat on Zoom, hold comments until the break, etc.).
- Announce upcoming events and other important program updates
- Notify students of class cancellations

OLLI Staff will provide Ambassadors with talking points as needed.

Technical Support

OLLI Staff and selected volunteers will provide technical support during set-up for Zoom and hybrid classes. OLLI Staff will provide training on Zoom and hybrid instruction to OLLI instructors upon request.

Transition

Team Chairs and volunteers will continue to serve in their current capacity until replaced through the process outlined in this policy, or if a Team Chair resigns from their current role.

OLLI Volunteers

The University is committed to providing significant opportunities for OLLI volunteer engagement and leadership. OLLI volunteers must adhere to the information on the [CSU](#)

[Volunteer Website](#) and in the [CSU Volunteer Document \(HR 2015-10\)](#), which will be made available on the OLLI website.

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.

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

OLLI volunteers may not make commitments on behalf of 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 counseled and may be released from their duties.

Volunteers will work through the OLLI Program Staff to request information or actions of University employees. 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.