

# OLLI Volunteer Leadership Guide

## Introduction

The dedication and hard work of our volunteers make OLLI at CSUCI's success possible, helping us extend our reach and enhance our impact within the community. The OLLI Advisory Council, made up of volunteer leaders including the Advisory Council Chairperson and Volunteer Team Chairs, plays a key role in supporting program operations.

Together with their teams, they offer valuable feedback and recommendations for the program's growth and future direction. For more details on the roles and objectives of the Advisory Council Chairperson and Volunteer Team Chairs, please refer to [OLLI at CSUCI's Organizational Guidelines](#).

## Background

The Osher Lifelong Learning Institute (OLLI) at Cal State University Channel Islands (CSUCI) is dedicated to enriching the lives of lifelong learners by providing opportunities for intellectual stimulation and social connection designed for adults aged 50+. We foster a love of learning through university-level courses, social and educational activities, and special events.

There are 124 OLLI programs connected with colleges and universities in all 50 states, and OLLI at CSUCI is your local Institute! Established in 2004, OLLI at CSUCI has been providing high quality lifelong learning opportunities to our community for over 20 years.

## Purpose

This document serves as a guide to help incoming volunteer leaders transition into their new roles. While these guidelines are based on the experiences of past volunteer leaders, we encourage you to find approaches that best suit your unique team and style, while still aligning with the objectives outlined in the Organizational Guidelines. We invite you to leverage your strengths and talents to make this role your own. You have the flexibility to meet with your team at intervals that work best for you, whether monthly, quarterly, or as needed by the program. Additionally, we encourage you to share the responsibilities outlined here with your team and delegate tasks in a way that enhances your team's effectiveness and cohesion.

# Advisory Council Leadership Roles

## Advisory Council Chairperson

Task	How To
Lead Advisory Council meetings	<ul style="list-style-type: none"> <li>- Participate in agenda creation with OLLI staff</li> <li>- Call meeting to order and lead meeting through agenda items</li> </ul>
Support growth of program and volunteer base	<ul style="list-style-type: none"> <li>- Attend Osher NRC conferences, workshops, and webinars as available</li> <li>- Review Basecamp and other OLLI websites for program development and volunteer engagement strategies</li> </ul>
Serve as a primary point person for Team Leaders and assist with resolving questions and issues as needed.	<ul style="list-style-type: none"> <li>- Address questions and concerns between team leaders as necessary</li> <li>- Consult OLLI staff as needed</li> </ul>
Ensure that Team Chairs keep the Chair and Vice Chair informed of new developments, concerns, or challenges within their teams.	<ul style="list-style-type: none"> <li>- Serve as liaison between staff and team chairs</li> </ul>
Work collaboratively with the Vice Chair and OLLI Program Staff on program initiatives and special projects, and initiate projects with the approval of OLLI Program Staff.	<ul style="list-style-type: none"> <li>- Projects vary</li> <li>- Ex) Cultivate campus connection between OLLI and CSUCI</li> </ul>

## Advisory Council Vice Chair

Task	How To
Serve as Chair-in-Training for a minimum of six months in preparation for assuming the role of Chair	<ul style="list-style-type: none"> <li>- Attend Osher NRC conferences, workshops, and webinars as available</li> </ul>
Preside over Advisory Council meetings in the absence of the Chair.	<ul style="list-style-type: none"> <li>- Call meeting to order and lead meeting through agenda items</li> </ul>
Work closely with the Chair on program initiatives, projects, and planning activities.	<ul style="list-style-type: none"> <li>- In collaboration with Chair and OLLI Staff</li> </ul>
Participate in program communications and meetings to maintain continuity and awareness of program operations.	<ul style="list-style-type: none"> <li>- Participate in agenda creation with OLLI Staff</li> <li>- Attend Advisory Council and special meetings</li> </ul>
Assist the Chair in supporting Team Leaders and addressing questions or issues as needed.	<ul style="list-style-type: none"> <li>- Assist with questions and concerns between team leaders as necessary</li> <li>- Consult OLLI staff as needed</li> </ul>
Collaborate with the Chair and OLLI Program Staff on program initiatives and special projects, and support the initiation of projects with the approval of OLLI Program Staff.	<ul style="list-style-type: none"> <li>- Projects vary</li> <li>- Ex) Cultivate campus connection between OLLI and CSUCI</li> </ul>

## Curriculum & Program Development Chair and Team

Task	How To
Seek new OLLI instructors (inside/outside Ventura County).	<ul style="list-style-type: none"> <li>- Review instructor recommendations from OLLI Basecamp provided by OLLI Staff</li> <li>- Conduct outreach to local community colleges, universities, and CSUCI faculty</li> <li>- Review post-session course-satisfaction survey for member recommendations</li> </ul>
Recommend instructor selection criteria and assess potential instructors' fit for OLLI program.	<ul style="list-style-type: none"> <li>- Review available data from post-session course satisfaction surveys, attendance reports, and revenue performance to inform assessment of potential instructors' fit for OLLI program</li> <li>- Review biography and qualifications on course proposals for new instructors</li> </ul>
Send Instructor Handbook to new instructors.	<ul style="list-style-type: none"> <li>- Available on <a href="#">OLLI website</a></li> </ul>
Meet before each term to review instructor proposals.	<ul style="list-style-type: none"> <li>- Send list of proposals to team members for review, provided by OLLI Staff</li> <li>- Organize an in-person and/or Zoom meeting to discuss course selections</li> <li>- Facilitate voting process for course selections</li> </ul>
Recommend courses for Fall and Spring sessions and Summer Taste	<ul style="list-style-type: none"> <li>- Consider diversity and range of course topics in each session</li> <li>- Avoid repeat courses within two calendar years at minimum</li> </ul>
Edit instructor bios and course descriptions for	<ul style="list-style-type: none"> <li>- Staff will send catalog draft for review.</li> </ul>

course catalog, review for errors.	
Provide feedback to instructors after staff provides evaluation data.	<ul style="list-style-type: none"> <li>- Staff will provide survey results for you to send to individual instructors.</li> </ul>
Plan for the long-term curriculum growth and development	<ul style="list-style-type: none"> <li>- Conduct monthly or bi-monthly meetings for curriculum planning and visioning</li> <li>- Identify relevant topics to engage our current membership and attract prospective members, especially those who are approaching or transitioning into retirement</li> </ul>
Seek novel ways for OLLI members to take OLLI courses, e.g., online courses	<ul style="list-style-type: none"> <li>- Explore new avenues for instruction (i.e. experiential courses)</li> <li>- Attend Osher NRC workshops as applicable</li> </ul>

## Membership Engagement & Outreach Chair and Team

Task	How To
Provide outreach to recruit new OLLI members, e.g., through tabling activities, and expand the diversity and inclusivity of OLLI membership	<ul style="list-style-type: none"> <li>- Attend outreach opportunities provided by staff (i.e. health fairs, farmer’s markets, community tabling events) and communicate opportunities to team members</li> </ul>
Manage weekly information request report	<ul style="list-style-type: none"> <li>- Follow up with new inquiries with a personalized welcome email that shares briefly about the upcoming course session, upcoming events, and provides a link to our website.</li> <li>- Assign follow-up phone calls to team members</li> <li>- Provide guidelines to new team members on follow up (see Appendix A)</li> </ul>
Distribute course catalogs throughout our local counties	<ul style="list-style-type: none"> <li>- Collaborate with staff to maintain up-to-date records of successful distribution locations.</li> <li>- Remove unsuccessful locations.</li> <li>- Scout potential new locations that reach our target audience.</li> <li>- Coordinate team members’ distribution efforts based on locality.</li> </ul>
Identify new opportunities to engage potential OLLI members	<ul style="list-style-type: none"> <li>- Identify potential outreach events and locations to promote our program to target audience.</li> </ul>

<p>Contact and deliver presentations on OLLI Program to service clubs, retired-member groups, and community organizations</p>	<ul style="list-style-type: none"> <li>- Research and connect with potential community partners to host information sessions</li> <li>- Co-lead or coordinate volunteer to present with OLLI staff in and around Ventura County</li> </ul>
<p>Conduct orientations for new OLLI members</p>	<ul style="list-style-type: none"> <li>- Co-lead or coordinate volunteer to present virtual information sessions with OLLI staff</li> <li>- Meet with new members and learn about their strengths and interests</li> </ul>
<p>Contact former OLLI members to solicit feedback on reasons for not continuing with OLLI</p>	<ul style="list-style-type: none"> <li>- In collaboration with OLLI Staff</li> </ul>

## Events & Experiences Chair and Team

Task	How To
<p>Plan, organize, market and facilitate educationally enriching activities outside of the classroom in consultation with OLLI Program Staff</p>	<ul style="list-style-type: none"> <li>- Research opportunities for drive-yourself and bus trips (i.e. museums, stadiums, government agencies, gardens, volunteer opportunities, etc.) with team</li>   <li>- Conduct outreach to explore and secure opportunities with team. Ideal to map out 12 months at a time.</li>   <li>- Obtain details on pricing, cancellation policy, refund policy, etc. from locations of interest</li>   <li>- Obtain bus quotes from approved vendors for approval by OLLI staff. Please inquire for at least two quotes for price comparison., with at least one bus quote for an ADA compliant bus. Must be specific with departure time and arrival time for each location.</li>   <li>- Provide all event costs to OLLI staff to calculate registration fees</li>   <li>- Please note that any university-sponsored food must come from campus catering, unless a right of first refusal is granted with justification</li>   <li>- Make reservations once approved.</li>   <li>- Consult Events Team Planning Form to map out event details including timing, meals, transportation, etc. (see <b>Appendix B</b>)</li>   <li>- Submit event request form ideally 4-6 months in advance, at minimum 3 months</li> </ul>

	<p>in advance. Include the following details:</p> <ul style="list-style-type: none"> <li>○ Date, time, and location of event</li> <li>○ Requester contact information</li> <li>○ Number of attendees</li> <li>○ Cost to members (in consultation with OLLI staff)</li> <li>○ Dates for email announcements: save the date and registration</li> <li>○ Transportation (bus, drive yourself)</li> <li>○ Registration system requirements <ul style="list-style-type: none"> <li>▪ Free drive yourself event: Airtable</li> <li>▪ Paid event: Cashnet</li> <li>▪ Virtual event: Zoom</li> </ul> </li> <li>○ Cancellation policy</li> <li>○ Notes, Contact and Any Necessary Billing Information</li> </ul> <p>- Create flyers for approved events with team</p> <p>- Ensure event liability waiver is signed by all participants</p>
<p>Plan social events to engage OLLI members and to thank OLLI volunteers in consultation with OLLI Program Staff</p>	<p>- Assist with planning and execution of OLLI Volunteer and Instructor Appreciation event</p>
<p>Adhere to CSUCI's policies, protocols, and procedures, including ADA compliance for any events taking place on or off campus</p>	<p>- For all bus trips, obtain at least one bus quote from an approved vendor for an ADA compliant bus</p> <p>- Prepare liability waiver for each event and day trip (staff will provide template)</p> <p>- Obtain liability waiver signatures from all event and day trip participants</p>

<p>Conduct service projects to help CSUCI students or people outside OLLI</p>	<ul style="list-style-type: none"> <li>- Research volunteer/community service opportunities and organize events with local organizations (i.e. Food Share) in collaboration with team</li> </ul>
<p>Encourage OLLI individuals to form special-interest groups open to all OLLI members</p>	<ul style="list-style-type: none"> <li>- Direct members to OLLI <u>Shared Interest Group website</u></li> </ul>

## Volunteer Connections Chair and Team

Task	How To
Maintain lists of active OLLI volunteers and people interested in becoming OLLI volunteers	<ul style="list-style-type: none"> <li>- Review Volunteer Interest Requests</li> <li>- Consult Team Chairs for current list of team members 3 times per year</li> <li>- List members in Reserve Team who are willing to do tasks as needed</li> </ul>
Speak with OLLI members to help find volunteer opportunities that meet their interests	<ul style="list-style-type: none"> <li>- Conduct outreach to new inquiries by phone and email</li> <li>- It is recommended to call first, so you can have a personal conversation to learn more about their interests and why they want to volunteer with OLLI</li> <li>- Follow up on volunteer sign-up list from social and outreach events</li> <li>- Assist prospective volunteers with finding roles that work for them, whether it is joining a team or being on “reserve” for one-off tasks</li> <li>- Assist volunteers with switching teams if needed</li> <li>- If volunteers are interested in joining a team, connect them with the respective Team Chair</li> <li>- Please see <b>Appendix C</b> for a sample welcome message and summary of volunteer teams.</li> </ul>
Obtain CSUCI Volunteer Forms	<ul style="list-style-type: none"> <li>- In collaboration with OLLI staff</li> </ul>
Help other teams identify specific volunteer tasks and opportunities both	<ul style="list-style-type: none"> <li>- Under guidance of OLLI Staff</li> </ul>

in person and on Zoom	
Recruit ambassadors for OLLI courses.	<ul style="list-style-type: none"><li>- Conduct outreach to team chairs to ask their teams</li><li>- Consult with OLLI staff to conduct outreach to enrolled students in each class</li></ul>

# Appendix A – Membership Engagement & Outreach Team

## New Team Member Guide

Helpful guidance for prospective member outreach:

1. There are no particular calling times. Find what works with your life. Some of our callers are still working so early evenings or weekends could be good times.
2. If the party does not answer the first time you call, do not keep calling. You can leave the OLLI number or the web site.
3. It is OK to tell the party when you do not know an answer. Tell them you will find out and call back. Often you know the answer, but would like to give additional information with a call back. Most people are just delighted that you called and know their name. You become OLLI.
4. It is helpful to keep the current catalog with you while making the calls. Also, a notepad and pen to write down the question.

### FOLLOW-UP PHONE CALL: PERSON TO PERSON SCENARIO

CALLER = Person who called OLLI Information Line

VOLUNTEER = You, OLLI Volunteer

Phone Rings:

CALLER: Hello

VOLUNTEER: Hello is \_\_\_\_\_ there? This is \_\_\_\_\_. I am a volunteer with Osher Lifelong Learning Institute -OLLI- volunteer. You submitted an inquiry online with questions about the OLLI program. I am following up to see if I can help answer any of your questions.

CALLER: Thank you for calling. I have my questions and problems solved. Thank you. I look forward to coming to class.

Questions you may receive:

- a. I would like to know about parking.
- b. Can I register on-line with a check?
- c. If I am taking the class on site, and miss a class can I see it later on my computer?
- d. Can I take more than one class?
- e. Do you take a credit card?

VOLUNTEER: I can tell you about \_\_\_\_\_. Or, you may not know the answer and can respond, “I don’t have an instant answer for that question. I will be

happy to research and call you back with the information you're looking for. Thank you for your patience.

#### FOLLOW-UP PHONE CALL--- ANSWERING MACHINE SCENARIO

VOLUNTEER: Leave a message similar to this: Hello, this is \_\_\_\_\_. I am a volunteer with Osher Lifelong Learning Institute –“OLLI” volunteer. You submitted an inquiry online with questions about the OLLI program. If you have already had your questions answered, great. If not, please visit our website at [go.csuci.edu/olli](http://go.csuci.edu/olli).

After leaving a message, you do not need to make a second call. However, you may receive a call back since your phone number may come up on their phone screen when making the initial call.

Remember, You Are OLLI and your phone calls make a difference. Thank You!

# Appendix B – Events & Experiences Team Planning Form & Timeline

## Events Team Planning Form

Name of Event:

Type of Trip (Circle One):    **Bus Trip**                      **Drive Yourself**

**Event Location:**

**Address:**

**Contact:**

**Name:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Email:** \_\_\_\_\_

**Date of Event:** \_\_\_\_\_

**Event Start Time:** \_\_\_\_\_

**Event End Time:** \_\_\_\_\_

**Departure Time:** \_\_\_\_\_

**Return Time (Camarillo):** \_\_\_\_\_

**Total Event Time Including Transportation:** \_\_\_\_\_

**Tour Available? (Circle One):**    **Yes**                      **No**

**Length of Tour:** \_\_\_\_\_

**Cost:**

**Transportation:** \_\_\_\_\_

**Tour:** \_\_\_\_\_

**Tickets:**

**Total Cost:**

**How to Pay:**

**CSUCI Credit Card**

**Submit Invoice to University**

**Refund Policy:**

**Cancellation Policy:**

**Deadline for Cancellation:**

**Number of Participants:** \_\_\_\_\_

**Meal Needed? (Circle One):**                      **Yes**                      **No**

**If yes (Circle One):**                      **BYO**                      **Paid meal out**

**If Paid Meal Out:**

**Restaurant idea 1:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Restaurant idea 2:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Restaurant idea 3:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Comments: (i.e. no photos, clothing requirements, etc.)**

## Events Planning Timeline

- Work with staff to determine:
  - Date of event
  - A workable timeline to plan and advertise the event.
- Basic Timeline for most events - see details in subsequent sections of this document.

<b>Task</b>	<b>Preferred</b>	<b>Minimum</b>
Scheduling event and booking space	4-6 months before event	12 weeks ahead for in-person, 8 weeks ahead for Zoom
Quotes for all costs (i.e. bus, tickets)	4-6 months before event	12 weeks ahead for in-person, 8 weeks ahead for Zoom
Creating Event and Registration Page	12 weeks ahead of when details will be published	8 weeks ahead of when details will be published for in-person. 4 weeks ahead for Zoom.
Advertising (usually start publicity 4 weeks ahead of event)	12 weeks before event. Flyers are required as supporting documents for University approval process.	8 weeks before event (if you do not need staff support with design work)
Catering	12 weeks ahead of event, though longer lead time will allow for more options  *Please note that any university-sponsored food must come from campus catering, unless a right of first refusal is granted with justification	8 weeks ahead of event

## Appendix C – Volunteer Connections Team Tools

Here are two tools for the Volunteer Chair. The first is a guide for the Thank You to be sent following the new Volunteer's choice of Team. I included a quick outline of all the Teams to assist in the assignment. It is important to stress the Chair will explain in detail about the work done and meeting times of their Team. I will also send a copy of the current Teams and our new Volunteer Reserve list separately.

Thank you note sample:

Dear \_\_\_\_\_

Thank you so much for volunteering with the \_\_\_\_\_ Team. Our OLLI Program could not exist without your contribution, as we are totally dependent on volunteers. Your willingness to donate your talents, time, and service is greatly appreciated. We look forward to your continued involvement with classes and our many volunteer opportunities.

Welcome aboard!

Sincerely \_\_\_\_\_

Volunteer Chair

Teams:

ADVISORY COUNCIL CHAIR

CURRICULUM Team Chair

The curriculum team reviews the course proposals and recommends the instructors for Spring and Fall as well as Summer Taste classes.

Input from many perspectives is important as we select a wide variety of interesting classes in order to draw new and returning OLLI students. Team members are always on the lookout for new and stimulating instructors, especially locally for our in-person classes.

MEMBERSHIP Team Chair.

The membership team is the life blood of OLLI. You can share your enthusiasm by telling others about the fun and value of OLLI classes and events. At Health Fairs you will meet people who are yearning for social connections or intellectual stimulation. OLLI helps people stay vibrant! Submitting OLLI information to local newspapers, posting on Acorn or Next Door, and distributing OLLI catalogs reaches out to grow our community.

EVENTS Team. Chair

The events team offers fun activities outside the classroom, both locally and

Internationally . A walking tour of Ventura or a visit to the Gibbon Conservation center have proven very interesting. A personal tour of the Getty Villa or a trip to Iceland are all included in the events. The team has taken on considerations for a book club, cooking class or a trip to the Channel Islands in the future.

#### **VOLUNTEER Team. Chair**

The Volunteer team reaches out to learn the new members' interests and talents to guide them to the team they might enjoy. We will also answer questions about current volunteer activities and opportunities. We need new volunteers and welcome the opportunity for recruitment.