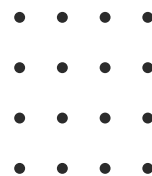




Osher Lifelong Learning Institute
at CSU Channel Islands



OLLI at CSUCI

Volunteer Guide



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OLLI Volunteer Leadership Guide

Introduction

The success of OLLI at CSUCI is made possible by the dedication and hard work of our volunteers. Their efforts help 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](#).

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 Chairperson

- Lead Advisory Council meetings
 - Participate in agenda creation meeting with OLLI staff
 - Call meeting to order and lead meeting through agenda items
- Support growth of program and volunteer base
 - Attend Osher NRC conferences, workshops, and webinars as available
 - Review Basecamp and other OLLI websites for program development and volunteer engagement strategies
- Serve as a liaison between Team Chairs to ensure intergroup cohesion and alignment with broader program goals
 - Mediate any conflicts as necessary between team leaders
 - Serve as liaison between staff and team chairs
- Lead individual meetings with volunteer teams
 - Step in as Team Chair as needed if incumbent is absent
- Cultivate OLLI – CI Campus Connection
 - Meet with CI Campus Leaders to discuss opportunities for enhancing OLLI's connection to campus

Curriculum Team Chair leads team members in accomplishing the following tasks:

- Seek new OLLI instructors (inside/outside Ventura County).
 - Review instructor recommendations from OLLI Basecamp provided by OLLI Staff
 - Conduct outreach to local community colleges, universities, and CSUCI faculty
 - Review post-session course-satisfaction survey for member recommendations
- Recommend instructor selection criteria and assess potential instructors' fit for OLLI program.
 - Review available data from post-session course satisfaction surveys, attendance reports, and revenue performance to inform assessment of potential instructors' fit for OLLI program
 - Review biography and qualifications on course proposals for new instructors
- Send Instructor Handbook to new instructors.
 - Available on [OLLI website](#)
- Meet before each term to review instructor proposals.
 - Send list of proposals to team members for review
 - May condense list to instructor name, bio, course title, and course description (optional)
 - Organize an in-person and/or Zoom meeting to discuss course selections
 - Facilitate voting process for course selections
- Recommend courses for Fall and Spring sessions and Summer Taste
 - Consider diversity and range of course topics in each session
 - Avoid repeat courses within two calendar years at minimum
- Edit instructor bios and course descriptions for course catalog, review for errors.
 - Staff will send catalog draft for review and to share with team members.
- Provide feedback to instructors after staff provides evaluation data.
 - Staff will provide survey results for you to send to individual instructors.
- Plan for the long-term curriculum growth and development
 - Conduct monthly or bi-monthly meetings for curriculum planning and visioning
- Seek novel ways for OLLI members to take OLLI courses, e.g., online courses
 - Explore new avenues for instruction (i.e. experiential courses)
 - Attend Osher NRC workshops as applicable

Membership Team Chair leads team members in accomplishing the following tasks:

- Provide outreach to recruit new OLLI members, e.g., through tabling activities, and expand the diversity and inclusivity of OLLI membership

- Attend outreach opportunities provided by staff (i.e. health fairs, farmer's markets, community tabling events) and communicate opportunities to team members
- Manage weekly information request report
 - 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.
 - Assign follow-up phone calls to team members
 - Provide guidelines to new team members on follow up (see Appendix A)
- Distribute course catalogs throughout our local counties
 - Collaborate with staff to maintain up-to-date records of successful distribution locations.
 - Remove unsuccessful locations.
 - Scout potential new locations that reach our target audience.
 - Coordinate team members' distribution efforts based on locality.
- Identify new opportunities to engage potential OLLI members
 - Identify potential outreach events and locations to promote our program to target audience.
- Contact and deliver presentations on OLLI Program to service clubs, retired-member groups, and community organizations
 - Research and connect with potential community partners to host information sessions
 - Co-lead or coordinate volunteer to present with OLLI staff in and around Ventura County
- Conduct orientations for new OLLI members
 - Co-lead or coordinate volunteer to present virtual information sessions with OLLI staff
 - Meet with new members and learn about their strengths and interests
- Contact former OLLI members to solicit feedback on reasons for not continuing with OLLI
 - In collaboration with staff

Communications Team Chair leads team members in accomplishing the following tasks:

- Review monthly the OLLI website 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
 - Draft an opening welcome message
 - Identify and interview good candidates for a profile feature in each issue (members or instructors)

- Draft brief articles on current program happenings (upcoming events, free seminars, volunteer opportunities, etc.) and include images
- Take photos and testimonials at activities and events and archive them for future use
 - In collaboration with OLLI staff
- Conduct outreach to local media outlets, calendars, and share about upcoming course sessions social media
 - Maintain and update list of newspapers and organizations with newsletters
 - Short write-up about upcoming courses session will be provided by OLLI staff
 - Send write-up and link to website and catalog
 - Post write-up on Next Door.
 - OLLI Staff manage the OLLI Facebook, but you can share on your Facebook page if you feel comfortable.

Events Team Chair leads team members in accomplishing the following tasks:

- Plan, organize, market and facilitate educationally enriching activities outside of the classroom in consultation with OLLI Program Staff
 - Submit event request form for approval by OLLI staff
 - Create flyers for approved events with team
 - Ensure event liability waiver is signed by all participants
 - Obtain quote for bus for approval by OLLI staff.
 - Must be specific with departure time and arrival time for each location.
 - Calculate ticket price based on quote and other event expenses (i.e. museum tickets).
 - Make reservations once approved.
 - Consult Events Team Planning Form to map out event details including timing, meals, transportation, etc. (see Appendix B)
- Adhere to CSUCI's policies, protocols, and procedures, including ADA compliance for any events taking place on or off campus
 - Under guidance of OLLI staff
- Plan and organize bus and self-drive trips to local or regional places of interest in consultation with OLLI Program Staff
 - Research opportunities for drive-yourself and bus trips (i.e. museums, stadiums, government agencies, gardens, volunteer opportunities, etc.) with team
 - Conduct outreach to explore and secure opportunities with team
 - Ideal to map out 12 months at a time
 - Obtain details on pricing, cancellation policy, refund policy, etc.
- Plan social events to engage OLLI members and to thank OLLI volunteers in consultation with OLLI Program Staff
- Conduct community service projects to help CSUCI students or people outside OLLI

- Research volunteer/community service opportunities and organize events with local organizations (i.e. Food Share) in collaboration with team

Volunteer Team Chair leads team in accomplishing the following tasks:

- Maintain lists of active OLLI volunteers and people interested in becoming OLLI volunteers
 - Review Volunteer Interest Requests
 - Consult Team Chairs for current list of team members 3 times per year
 - List members in Reserve Team who are willing to do tasks as needed
- Speak with OLLI members to help find volunteer opportunities that meet their interests
 - Conduct outreach to new inquiries by phone and email
 - 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
 - Follow up on volunteer sign-up list from social and outreach events
 - Assist prospective volunteers with finding roles that work for them, whether it is joining a team or being on “reserve” for one-off tasks
 - Assist volunteers with switching teams if needed
 - If volunteers are interested in joining a team, connect them with the respective Team Chair
 - Please see Appendix C for a sample welcome message and summary of volunteer teams.
- Obtain CSUCI Volunteer Forms
 - In collaboration with OLLI staff
- Help other teams identify specific volunteer tasks and opportunities both in person and on Zoom
- Recruit ambassadors for OLLI courses.
 - Conduct outreach to team chairs to ask their teams
 - Consult with OLLI staff to conduct outreach to enrolled students in each class

Appendix A – Membership 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 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.

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 Team Planning Form

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.)

Appendix C – Volunteer Team Chair Tools provided by Catherine Crowley

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.

COMMUNICATION Team Chair

The communication team produces our OLLI Newsletters to keep all members informed. Team members can interview members , instructors or staff for upcoming articles. They assist to design a social media campaign to attract new members. We will need photos from classes and events, especially travel. We also submit articles for newspapers and the National OLLI organization .

FINANCE Team Chair.

The Finance team watches our OLLI finances and proposes grant applications to the national organization. Helping the staff prepare financial reports provides great insights into our OLLI program and its future. You can even help guide our generous OLLI members to financially support our wonderful program.

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.

