



UC DAVIS



SEPTEMBER 1, 2020

CONTENTS

GETTING TO KNOW OLLI AT UC DAVIS	4
The Purpose of this Document.....	4
The Value of Membership in OLLI.....	4
OLLI Vision/Mission	5
The Importance Of Volunteers To OLLI	5
OLLI ORGANIZATION	6
OLLI COMMITTEES.....	7
Curriculum Committee.....	7
Operations Committee.....	7
Technology Committee.....	8
Membership Committee.....	8
Volunteer Committee	8
Good Citizen/Community Outreach Committee	8
Office Assistance Committee	9
LOOKING TO THE FUTURE!	10
Facilities Committee	10
Social and Social Media Committee	10
Development Committee	11
GOVERNANCE	11
Executive Board	11
Executive Committee Of The Board.....	14
APPENDIX	16
Sample of Member and Volunteer Events	16

COVID 19 UPDATE

The pandemic resulting from the COVID-19 virus has necessitated changes to the operations and delivery of the OLLI program. Classes and volunteer activities have moved to a virtual format. For the latest information on how OLLI is evolving to serve its members during this historic period, please visit OLLI UC Davis' COVID-19 Blog at <https://cpe.ucdavis.edu/olli/blog>

The OLLI UC Davis Volunteer Guidebook was written and created by volunteers Nan Klein, Charlotte Lucero and Dale Good. The OLLI Executive Board and staff wish to express their appreciation for their diligence, time and expertise in drafting this document.

Note: Nothing in this document supersedes the OLLI Policies and Procedures (version 04112019). Segments of the content of OLLI's Policies and Procedures have been incorporated herein. Additional content is added with a specific focus on explaining the value of membership and volunteer activities.

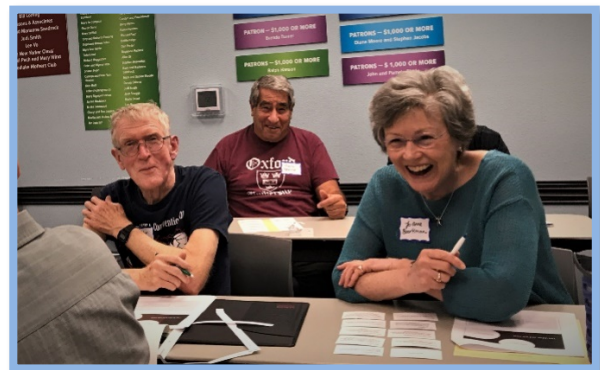
GETTING TO KNOW OLLI AT UC DAVIS

THE PURPOSE OF THIS DOCUMENT

The purpose of this guide is to provide a handy guide that offers clarity to all members about the value of membership, and about the need for and the benefits both to Osher Lifelong Learning Institute (OLLI) and to the individual member of their volunteer efforts. This guide will help members understand all of the activities that “make OLLI click” which may not be apparent simply from course attendance. It will also serve as a guide to those considering participation on a particular committee or activity as a volunteer.

THE VALUE OF MEMBERSHIP IN OLLI

Welcome to OLLI at UC Davis! We are glad you’ve joined us. OLLI at UC Davis provides lifelong learning for older adults through diverse and intellectually stimulating courses and events. Volunteers and members alike benefit from the collegiality and social experience that enhances their lives as they approach and enjoy retirement. Courses are offered most weekdays throughout the day, and special events are offered on some weekends. OLLI supports the demographics of our participants by conducting courses where classrooms are generally accessible for those with mobility, hearing, or vision challenges. OLLI is wonderful and life-enriching. Thank you for joining us and enjoy your experience!



OLLI VISION/MISSION

OLLI at UC Davis provides lifelong learning for adults over 55 through diverse and intellectually stimulating courses. It is a participatory and self-directed group. Our mission is to further the pursuit of lifelong learning by offering a diverse educational program of high quality, affordable courses, and events in Davis and surrounding communities. Participants benefit from the intellectual stimulation, comradery, and social experience that enhances their lives as seniors. (See “The Value of Membership in OLLI” above.)

THE IMPORTANCE OF VOLUNTEERS TO OLLI

OLLI at UC Davis relies on member volunteers to enhance our programs. Members teach courses, lead discussions, serve on the Executive Board and committees and assist in the classroom as Teaching Assistants (TA's), Audio Visual (AV) technicians and classroom hosts. We also use member help in the office, at special events and to recruit new members. Volunteers meet new people, develop new skills, and contribute in many ways to the success of our programs. Our volunteers will tell you that the collegiality and social experience in our classrooms and committees enhance their lives. Our engaging learning experiences and all the preparation for our classes are the result of these volunteer efforts. OLLI values its volunteers.

Please consider sharing your talents as an OLLI volunteer. There are many opportunities to help throughout the year which may be one time only, once per year or ongoing each academic quarter. You can find a way to help that fits your schedule, your skills, and your area of interest.

For more information about volunteering, please contact the Volunteer Committee Chair at: ollivolunteerchair@gmail.com or contact the OLLI office per the contact information on page 14.

OLLI ORGANIZATION

OLLI, as a part of UC Davis, is a non-profit organization. It is a collaborative entity with an Executive Board who sets policy and provides guidance regarding the general activities of OLLI. It monitors budget items, establishes goals, oversees all committee activities and reports to the Osher Lifelong Learning Institute, as required. OLLI has a very small paid staff responsible for the critical functions of the organization. Volunteers provide all other programmatic support.

OLLI at UC Davis adheres to all administrative, financial, and operational policies as set forth by the Regents of the University of California; University of California Davis; University of California Foundation; University of California Continuing and Professional Education (CPE); and the UCD Principles of Community.

OLLI at UC Davis operates through financial support from membership fees, course fees, fundraising, in-kind and monetary support from the UC Davis CPE and proceeds from the Bernard Osher Foundation Endowment.

Anyone can contribute financially to OLLI. Donations to our charitable entity, *The Heart of OLLI*, help us to do good work. Donations fund updated equipment, support outreach, operations and special events and subsidize OLLI course scholarships for seniors in need. In addition, OLLI is able to provide comprehensive programs to our members with minimal professional staff. This enables us to keep membership fees low and provide a real financial benefit to *all* members, as well as the donors.

OLLI at UC Davis adheres to the financial reporting requirements as defined by the UC Davis CPE. Contributions to the Heart of OLLI may be deductible, depending on your tax status. See your personal tax advisor to learn if this applies to you.

OLLI COMMITTEES

OLLI Committees are the heart of our volunteer organization. Some committees are formal and are led by board members. Members of our formal committees provide longer-term assistance in the form of advisory groups, task forces or working groups. Generally, members of these committees agree to serve for periods of a year or more on a committee.

Other volunteer opportunities are stand-alone or ad-hoc and vary in duration, addressing a specific objective and are disbanded when that need is met.

See the Appendix for a sampling of the events and meetings happening during the OLLI year.

CURRICULUM COMMITTEE

UCD faculty, emeriti, past OLLI instructors, scholars and experts from the general community comprise the collective of OLLI instructors and course moderators. Curriculum Committee members review course proposals and meet with prospective instructors regarding the proposal, expectations, and decisions.

OPERATIONS COMMITTEE

Operations Committee members recruit, train and assign volunteer Teaching Assistants (TA) to each class instructor.

OLLI's classrooms are rented either from the University or from community organizations. The Operations Committee ensures that the rooms are properly set up before class begins and are returned to their previous state when class is over. TAs clean up any trash, ensure desks and chairs are neatly arranged and clean whiteboards.

TECHNOLOGY COMMITTEE

The Technology Committee, sometimes referred to as the Audio-Visual (AV) Committee, ensures operability of technology (computer, projector, hearing devices, etc.) for instructors and students and trains volunteers to properly operate it. They schedule equipment and trained technicians for each session in the OLLI classrooms.

MEMBERSHIP COMMITTEE

The Membership Committee members generate and work with OLLI staff on new member recruitment and production of member informational materials. They help staff prepare and maintain an up-to-date membership roster, prepare mailings, and make follow-up calls regarding membership inquiries.

VOLUNTEER COMMITTEE

Volunteers are always needed! The Volunteer Committee will assist other committees and staff in the recruitment of new volunteers. This committee will also assign volunteers to those committees and activities that support all OLLI functions such as classroom TAs, special events, the OLLI office and other activities as needed.

GOOD CITIZEN/COMMUNITY OUTREACH COMMITTEE

Davis and surrounding areas are wonderful communities and provide many opportunities to reach out and find new members. The committee reserves space at community events and schedules volunteers who will participate by handing out promotional materials, answer questions and otherwise publicize OLLI to potential members.

OFFICE ASSISTANCE COMMITTEE

Because the OLLI office is minimally staffed, we need volunteers who can type, file, copy, make phone calls and perform other time-sensitive, but not stressful tasks. This committee ensures that upcoming needs have volunteers staffed and trained as necessary.



OLLI office volunteers assisting in a catalog project.

LOOKING TO THE FUTURE!

All healthy organizations look for changes that will make them better. They streamline processes, check with members for input and work to make the end result more efficient, effective, and satisfying. OLLI is no different. We expect to see some new committees and small changes to the way some of our current committees work. The following section illustrates a variety of future committees not yet convened:

FACILITIES COMMITTEE

Finding appropriate classroom space is difficult and challenging. In the long term we hope to have a permanent setting that could be a dedicated social, educational, and cultural asset for the program. Members of this committee will scout-out potential facility opportunities and/or assist the Development Committee in recruiting donors for the development of a full-service OLLI facility.

SOCIAL AND SOCIAL MEDIA COMMITTEE

This committee will train and assign volunteers to post items of interest and photos about various events, classes, and social activities before, during and after each occasion. The intention is to provide positive awareness of OLLI, its participants, and upcoming important dates to the community as a whole, not just OLLI members.

This committee may also work on ways to advertise events to members, manage registration, and coordinate food and entertainment at planned events. They may also ensure announcements on the OLLI website, the Davis Enterprise, the Davis Dirt, the Sacramento Bee, and other publications.

DEVELOPMENT COMMITTEE

Though OLLI at UC Davis has benefitted from the endowment of the Bernard Osher Foundation, the institute depends on philanthropic support. The Development Committee members will aid in setting fundraising goals, planning campaigns, and organizing volunteer fundraising outreach. It also will educate members on ways they can make donations to OLLI both now and in the future.



OLLI Donor Wall at the Galileo Classroom

GOVERNANCE

EXECUTIVE BOARD

Over time, some of our members will develop a desire to serve OLLI as a member of its Executive Board. There are many jobs on the board, most are in positions of leadership for certain committees, but all contribute to the health and well-being of OLLI.

OLLI AT UC Davis operates under the direction of the OLLI Executive Board (Board) with the approval of UCD CPE. The duties of the Board are to set policy, establish procedures and operating rules, oversee financial affairs, and maintain the history and official documents of OLLI at UC Davis. The entire Board is comprised of volunteers except the Program Director who serves in a paid position.

Several of the Board Members are also Committee Chairs – overseeing the Curriculum, Operations, Technology, Membership and Volunteer Committees.

The Board is comprised of, and their duties are as follows:

President

- Develops the Board meeting agenda with the Program Director and conducts the Board meeting.
- Presides at all meetings of the general membership.
- Maintains communications with the Program Director.
- Forms ad hoc committees as needed for special projects.

Vice President

- Conducts meetings when the President is absent.
- Initiates fundraising to augment the OLLI operations account by identifying and pursuing additional sources of funding from foundations, individual donors, organizations, and businesses in the region.
- Forms a Development Committee to assist in fundraising, if needed.

Treasurer

- Assists the Program Director in preparation of the OLLI annual budget.
- Presents the OLLI annual budget to the Board.
- Reviews the OLLI financial statements quarterly with Program Director and Board.

Recording Secretary

- Ensures that minutes are recorded at each Board meeting.
- Sends draft minutes to President and Program Director for review.
- Sends the minutes to the Board members after receiving the approval of the President and Program Director.

Curriculum Committee Chair

- Works with Curriculum Committee to develop a slate of proposed classes and instructors each quarter.
- Presents proposed slate of classes to the Board each quarter according to UCD CPE deadlines.
- Develops, in coordination with the Program Director, class schedules for each quarter.
- Screens potential new instructors with the Program Director, as needed.
- Oversees development of new forms and materials germane to the Curriculum Committee.
- Communicates with the Program Director regarding developments with instructors that require intervention.

Operations Committee Chair

- Recruits, trains, and coordinates teaching assistants (TAs).
- Schedules TA volunteer assignments each quarter.
- Communicates with the Program Director regarding developments with volunteers that require intervention.

Technology Committee Chair

- Recruits, trains, and coordinates volunteers on basic multi-media operations.
- Schedules multi-media volunteer assignments for each quarter.
- Communicates with the Program Director regarding developments with volunteers that require intervention

Membership Committee Chair

- Seeks opportunities and attends events to promote OLLI membership.
- Brings to the Board ideas to build public awareness of OLLI within the community and region.
- Oversees activities relating to outreach and recruitment of new members and steward retention of current membership.
- Networks with current members to identify potential outreach opportunities.

Volunteer Committee Chair

- Works with the Board and membership chair to identify potential volunteers within the membership of OLLI at UC Davis.
- Maintains a listing of potential volunteers and their areas of interest.
- Forms sub-committees to manage specific volunteer duties (e.g., Farmers' Market, Speakers' bureau, and community outreach)
- Communicates with the Program Director regarding developments with volunteers that require intervention.

Advisor(s)

- Advisors are nominated by the Board President and approved by a quorum of the Board.
- Advisor terms of office are set on a case-by-case basis.

■
■

EXECUTIVE COMMITTEE OF THE BOARD

The Executive Committee of the Board consists of the President, Vice President, Curriculum Chair, Treasurer and Recording Secretary. The Program Director serves as a non-voting member of the Executive Committee. The Executive Committee may approve decisions when the full Board is not available, or timeliness is an issue. Meetings of the Executive Committee are convened as deemed necessary by the President or Program Director. The minutes from any meeting of the Executive Committee are reported at the next full Board meeting. A simple majority of the Executive Committee present is sufficient in order to approve any action.

If you have more questions about OLLI membership or volunteering, please

- Visit our website at <https://cpe.ucdavis.edu/areas-study/osher-lifelong-learning-institute>
- Email us at cpeinfo@ucdavis.edu or
- Call us at (530) 752-9695



OLLI at the UC Davis Bodega Bay Research Center

APPENDIX

SAMPLE OF MEMBER AND VOLUNTEER EVENTS

GOVERNANCE

Board Meetings

Monthly

Curriculum Committee Meetings

Annually and Monthly

Nomination of Board Candidates

As needed

OLLI National Conference

Every 18 months

OPERATIONS

Classes

Quarterly

TA Training

Quarterly

AV Training

As needed

Think Tank

Annually

Catalogue Preparation

Three times per year

Office Assistance

As needed

COMMUNICATION & OUTREACH

Picnic Day Parade

Annually

One-Day University

Semi-Annually

Science and Society Program

Semi-Annually

Kangas Lecture Series

Annually in October