



The logo for North Carolina State University is a black rectangle containing the text "NC STATE UNIVERSITY" in a white, bold, sans-serif font, centered within the rectangle.

# Committee and Volunteer Handbook

Dear OLLI Volunteer:

We are thrilled that you have chosen to volunteer with OLLI at NC State. Volunteers are a vital part of the program and play a key role in developing the program content and keeping operations running smoothly in the classroom and out in the community. We hope that you find your duties to be fulfilling and that your volunteer experience with us is rewarding and positive.

This handbook is designed to facilitate your volunteer role -- it includes an overview of the program, FAQs, and information about the roles and responsibilities of volunteers. If you have any questions, please feel free to contact me, the staff liaison for your committee, or the chair of your committee or volunteer group.

Welcome and thank you!

Sincerely,

Eliza Kiser  
Director  
OLLI at NC State University  
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## **Staff and Volunteer Roles on Committees**

OLLI has several standing committees composed of OLLI members. There is a staff liaison assigned to each committee. These committees help guide, promote and develop OLLI programming:

- Program Development Committee
- Financial Advisory Committee
- Membership Development & Marketing Committee
- Hospitality Committee
- Inclusion & Accessibility Committee
- The OLLI Advisory Council (by appointment)

It is important for all committee members and volunteers to have a basic understanding of the scope and work of all OLLI committees and volunteer roles. This overall understanding facilitates cooperation among the different committees, and it also may open new avenues for volunteering in the future. The four standing committees are open to all OLLI members whose skills and interests meet the needs of the committee. The OLLI Advisory Council is by appointment only, and it is composed of OLLI members who have demonstrated a commitment to the program by a strong record of volunteering. The Council makes recommendations on program direction and provides a forum for all committee chairs to interact.

The descriptions here are intended as an overview. Committee job descriptions provide a more detailed account of roles and responsibilities; contact the office for more information.

## **General Information about OLLI Standing Committees**

### **Role of the Committee Chair**

The chair of each committee is appointed by the chair of the Advisory Council, in consultation with the OLLI staff liaison, for a term of two years; may be reappointed. Term of service begins on July 1. The chair provides leadership for the committee including: convening meetings, helping to set the agenda and distributing it to committee members, running the meetings in an efficient fashion, and liaising with appropriate OLLI staff. The chair appoints the members of his/her committee, in consultation with OLLI staff. All chairs also serve on the Advisory Council. The Committee chair ensures that minutes are taken at each meeting (usually on a rotating basis), and finalized in a timely manner.

### **Role of Committee Members**

Members typically serve on a committee for 3 years; may be reappointed if mutually agreed upon by staff liaison and committee chair. New members are named to each committee as needed and in a staggered fashion to maintain continuity. Members are expected to regularly attend and participate in meetings and take an active role in the work of the committee. Committee membership varies from 6-15, depending on the work of the committee. Committee members also play an active role in recruiting new members to the committee.

### **Confidentiality Statement**

In the course of carrying out committee work and attending meetings, members occasionally may learn sensitive information about OLLI operations, members or instructors (e.g., course evaluation

results). This information must be kept confidential and only discussed within the appropriate committee meetings.

## **Program Development Committee: “*Converting Ideas into Courses*”**

OLLI members contribute to the work of the Program Development Committee by first serving on a topic-related **Program Subcommittee**:

- Arts/Architecture
- Business/Economics/Government/Politics
- Cultures/Countries/History
- Lifestyle/Health/General
- Literature/Writing
- Religion/Philosophy/Psychology
- Science/Technology

Leadership for the topic subcommittees is provided by a coordinator, who also serves on the Program Development Committee. The coordinator serves as the liaison between the subcommittee and the Program Development Committee, which can help if a subcommittee is struggling to bring a course idea to fruition. Subcommittees meet 3-4 times a year to brainstorm course ideas and then develop written proposals, which are approved by OLLI’s Program Manager. Staff typically does not participate in these meetings unless invited to take part for a specific reason. Each subcommittee coordinator keeps the Program Committee Chair and Program Manager informed of courses in the pipeline.

The **Program Development Committee** meets 11 times a year and is composed of individuals who have previous experience in the subcommittee setting. They are asked to join the Program Development Committee after demonstrating a capacity to take a broader perspective of curriculum development. Program Committee members work with the Chair and Program Manager to finalize each semester’s program. The OLLI Director, Assistant Director, and Special Programs Coordinator may all be present at the full committee meetings but the primary staff liaison is the Assistant Director.

<b>Program Development Committee</b>	
<b>Volunteer Role</b>	<b>Staff Role</b>
Work to fill the course calendar each semester with a variety of multi-week courses and single lectures and with the support of the Program Manager.	Provide regular progress reports on calendar to volunteers at Program Committee meetings. Provide support and advice to committee members.
Access course calendar for each semester on Google Drive at regular intervals to check on available openings.	Keep course calendar and category sheet updated on Google Drive to include other pertinent documents for committee work.
Propose course offerings that will attract and appeal to a diverse membership base.	Evaluate course proposals and provide feedback to volunteer. Approve course proposal when it meets the program requirements/criteria.
At Program Committee meetings, be prepared to present and discuss proposed course offerings	Provide a report at each meeting and other input as appropriate.

that are proving difficult to finalize so that others may offer advice/ideas.	
Collaborate with other members who share interests in developing course offerings.	Provide input as needed.
Research potential instructors using resource list, people you have heard speak or have been recommended to you by those who have, people you know and that have the required expertise and skills.	Research potential instructors and provide guidance to volunteers when necessary on whether it is appropriate to contact someone, for example if they are taking a break, no longer wish to teach for OLLI or have taught before and not received satisfactory evaluations.
Identify and develop contacts in the community.	Provide contact information if necessary or information on whether an individual or organization has any previous history with the program.

### **Membership Development & Marketing Committee: “Spreading the Word”**

The Membership Development & Marketing Committee meets six times a year to discuss ways to attract new members and retain existing ones. They make presentations in the community, phone calls to members, and deliver catalogs to select sites around the Triangle area. OLLI’s Director is the primary staff liaison, with the Business & Communication Coordinator (BCC) providing administrative support.

<b>Membership Development &amp; Marketing Committee</b>	
<b>Volunteer Role</b>	<b>Staff Role</b>
Works to recruit, welcome, and retain OLLI members. Makes limited phone calls to inactive members and new members annually as a way to engage and retain members.	Provides information about enrollment and membership, which helps shape committee’s work. Fully participates in discussions about how to recruit, welcome, and retain OLLI members. Sets budget for marketing activities.
Speaks to groups about OLLI and why it is so enjoyable and rewarding	Director creates annual “groups to contact” list. BCC keeps track of upcoming presentations and records the results. Organizes resources for presentations
Thinks about ways to promote OLLI and get the word out about the program	Takes part in discussions about ways to promote OLLI and get the word out about the program
Distributes OLLI catalogs to locations that prospective members visit	Director organizes catalog distribution list, with feedback from committee members. BCC packages catalogs for committee members to pick up and distribute.
Assists in building a diverse and engaged membership	Assists in building a diverse and engaged membership

## Financial Advisory Committee: “Ensuring OLLI’s Future”

The Financial Advisory Committee meets four to five times a year and has an understanding of the operating budget, which helps them create an annual development plan for the program. OLLI’s director is the staff liaison, with the SPC providing support for Day of Giving.

Finance & Development Committee	
Volunteer Role	Staff Role
Discuss and draft fundraising appeals	Drafts fall fundraising email, Day of Giving emails, and thank you emails. SPC manages social media posts related to Day of Giving.
Collaborate with staff to seek sponsorships.	Creates spreadsheet with groups to contact. Provides guidelines on how to approach sponsors and benefits and parameters of sponsorship. After success, confirms and communicates with sponsors.
Reviews and understands annual budget	Staff creates previous FY budget vs. actuals and creates current FY budget and reviews with committee members, including challenges and successes.
Visit with sponsors at OLLI social events and thank them for their support	Invite and make arrangements for sponsors to attend OLLI social events
Help educate OLLI members and community organizations about OLLI fee structure, financial needs, and fundraising options.	Staff creates annual fundraising plan, with feedback from committee members, which helps guide committee’s annual operations.

## Hospitality Committee: “Great Events, Lots of Fun”

The Hospitality Committee meets 3-4 times a year to plan details and coverage for OLLI events, such as the fall picnic and summer instructor recognition event. The OLLI Special Programs Coordinator attends all meetings and is the primary staff liaison.

Hospitality Committee	
Volunteer Role	Staff Role
Meet prior to each special event to share in planning the event	Meet with committee prior to each special event to plan coverage for the event. Book a room for the meeting.
Volunteer for specific activities at each special event including greeting members, issuing name tags and table decorating.	Agree on coverage needed at each special event with OLLI staff team and communicate this to committee chair and members
Provide coverage to check in members for one-	Provide list of lectures needing coverage to

time lectures in large rooms (day time and some evenings)	committee chair in advance of registration for each semester
Arrive prior to events to help with set-up and stay afterwards to assist with clean up	Arrive prior to events to help with set-up and stay afterwards to assist with clean up. Purchase any supplies needed and bring to event at set-up time
Attach gift labels to instructor appreciation gifts once a year	Purchase gifts and ensure supplies and room are available for this activity

**Inclusion & Accessibility Committee (new in 2023-24): “*Focused on the individual member’s experience*”**

The Inclusion & Accessibility Committee is a new addition for the 2023-24 Academic Year. In its inaugural year, the committee will meet 5- 6 times to flesh out the committee’s functions. Broadly, looks at the program and organization holistically through the lens of the individual member experience; identifies barriers to participation in OLLI programming; researches best practices for addressing identified barriers and needs and makes recommendations to OLLI staff; serves as a consulting group to other standing committees as issues or opportunities arise; assists in development and implementation of OLLI’s strategic plan; develops relationships with other community organizations focused on diversity, equity, inclusion and accessibility work; in cases where inclusion and accessibility efforts present significant costs, collaborate with OLLI staff to brainstorm potential funding strategies and/or to create a phased approach to addressing the need. The work of this committee will vary over time depending on specific issues or opportunities that arise, but, broadly, will cover topics of diversity, equity, inclusion, and accessibility as they pertain to a member or potential member’s experience of OLLI. The OLLI Director attends all meetings and is the primary staff liaison.

<b>Inclusion &amp; Accessibility Committee</b>	
<b>Volunteer Role</b>	<b>Staff Role</b>
Communicate transparently about potential barriers to member participation in OLLI programs.	Schedule Committee meetings. Book a room for the meeting.
Brainstorm with staff about ways to address barriers to participation in programming.	Communicate transparently about feedback received from members requesting accommodations or reporting difficulty participating.
Develop relationships with other OLLI standing committees and attend their meetings periodically	Assist committee with prioritizing request for assistance from other committees.
Develop relationships with other community and/or university organizations focused on diversity, equity, inclusion and/or accessibility efforts	Develop relationships with other community and/or university organizations focused on diversity, equity, inclusion and/or accessibility efforts
Recommend priorities for projects to address inclusion and accessibility issues	Pursue funding for committee priorities

## **OLLI Advisory Council**

The OLLI Advisory Council meets five times a year and allows the standing committees and member representatives to stay informed about the “big picture” of OLLI. The Council vets and makes recommendations on issues such as establishment and modification of program components, fee changes, setting guidelines and developing overall goals, and giving input on issues that staff bring before it. Council members serve as information conduits to the general membership and the full standing committees. New ideas emerge from discussions that take place at Advisory Council meetings.

The Advisory Council serves in an advisory capacity rather than as a governing “board.” OLLI at NC State is a unit of NC State Continuing & Lifelong Education (NCSCaLE). OLLI’s director is responsible for the budget and day-to-day operations; oversight for OLLI at NC State is provided by the Vice Provost for Continuing Education and other university staff. Therefore, the OLLI Advisory Council’s power is to influence, and it is intentionally called an Advisory “Council” rather than a “board.”

### **Composition, Selection Process, and Terms of Service:**

Council membership is comprised primarily of OLLI members, although from time to time NC State faculty and community partners have served on the Council. The president of the Association of Retired Faculty, the past OLLI Advisory Council chair, and chairs of the standing committees are ex-officio members of the Council. OLLI staff are non-voting ex-officio members of the Council. The Council should have no more than 24 and no fewer than 10 voting members. Members are appointed by the Vice Provost of Continuing Education for a term of three years. Council members may vote to extend a particular member’s term. Terms are staggered to provide continuity.

Each January, the chair of the Advisory Council appoints three current members to serve as the nominating committee for selecting three new Council candidates (and, in alternating years, the candidates for the Advisory Council chair). The Director or his/her designee serves as liaison to this committee. Nominees are approved by a majority vote of the Advisory Council (usually at the March meeting) and sent to the Vice Provost of Continuing Education for approval and appointment. Approved nominees begin their term of service on July 1.

In order to be nominated to the Advisory Council, at-large candidates should meet these criteria:

- Participation in OLLI classes and activities over a number of years, resulting in a wide acquaintance with the organization and its members.
- Service to OLLI as a committee member, volunteer, instructor/presenter, class host, or special interest group leader.
- Ability to work collaboratively with OLLI staff by providing planning, guidance, and policy recommendations.
- Confidence to speak up and express opinions during a decision-making process.

### **Meeting Procedures:**

A majority of voting members constitutes a quorum for conducting meetings. The council meets five times a year, usually in September, November, January, March and May. Additional meetings may be called by the chair, Executive Committee, or at the request of at least three members of the council.

### **Advisory Council Chair Role**

Selection and term of office: The chair of the Advisory Council serves a two-year term beginning July 1, after his/her election at the March meeting of the Council.

Responsibilities:

- Convenes and chairs Council meetings
- Works with OLLI staff to set the Council's agenda
- Keeps Council informed on important matters
- Appoints chairs for standing committees
- Serves as ex-officio member of all OLLI standing committees

In the absence of the Advisory Council chair, the chair of the Program Committee serves as acting chair at meetings. Following the two-year term, the Council Chair may continue to serve in an ex-officio capacity as past chair for an additional two years.

### **Advisory Council Executive Committee**

The Executive Committee is comprised of the chair and the past chair of the Advisory Council and the chairs of the operating committees. The Committee meets outside of the regular Council meetings to address issues that need attention, issues of concern, issues that primarily impact the functioning of the standing committees, or issues that require small group deliberation that will later be reported out to the full Council. Meetings are held as called by the Advisory Council chair. OLLI's director is an ex-officio member, with other staff designated, as relevant to the issues being addressed by the committee.

### **Other OLLI Volunteer Roles**

**Volunteer Coordinator** identifies and responds to requests for community service opportunities both within and outside the NC State campus community. Informs members and coordinates OLLI member participation in selected volunteer opportunities.

**Class Hosts** help out in a class in which they have already enrolled. Their duties include: helping the volunteer instructor get settled into the classroom, distributing handouts, assisting with AV, and reading weekly announcements. Training is provided, and OLLI's Program Manager provides support during the first couple of weeks.

**OLLI Ambassadors** welcome all members to classes, in which the Ambassador is already enrolled, and help new members get acclimated (finding table tent, answering basic questions, etc.).

**Photographers** take photographs at OLLI events and in the classroom to be used for publicity purposes and to share with members who participated in the events.

**OLLI Voices Blog** tells the stories of our members' and instructors' adventures in lifelong learning!

### **Frequently Asked Questions**

#### **How did OLLI at NC State begin? How long has it been around?**

The program was founded in January 1991 as the Encore Program for Lifelong Enrichment. It began after a multi-year process of discussion and planning by many individuals at North Carolina State University and in the greater Raleigh community. Sondra Kirsch, Associate Vice Chancellor of University Extension, and Chuck Korte, Professor of Multidisciplinary Studies, had both been exploring the idea of initiating a new program to serve the educational needs of older adults in Raleigh. When they met about this during the summer of 1989, the idea for Encore was sketched out and planning begun. (The Korte/Kirsch Encore Endowment, a current and future source of funding for the program, was named after these two founders of the program.) In the fall of 1990, the first Encore Advisory Council was appointed, chaired by Chuck Korte. Later that fall, the first brochure was produced, the name Encore

adopted, and a community reception was held at the McKimmon Center to publicize the new program. The spring 1991 semester was open for business and registrations flowed in!

### **Why is OLLI structured the way that it is?**

OLLI at NC State is one of more than 400 such programs nationwide. The first program was founded in 1962 as the Institute for Retired Professionals at the New School for Social Research. In the following decades, several more programs were developed. The next big wave came in the 1990s, when Encore was founded, and there has been steady growth in lifelong learning institutes in the 21st century. The idea behind these programs is that members will take an active role so that the program reflects the members' interests. The strong member role also allows these programs to evolve over time to continue to meet member needs.

### **When and why did the program name change to OLLI?**

The Bernard Osher Foundation, founded in 1977, is a philanthropic organization headquartered in San Francisco that supports higher education and the arts. The Foundation began funding lifelong learning institutes in 2001. Between 2005-2012, a relationship with the Osher Foundation and Osher National Resource Center staff developed through contact at regional and national conferences. In 2012, we were invited to submit a grant proposal to receive \$100,000 in funding from the Osher Foundation. After consultation with key member leaders, the decision was made to proceed, and the grant proposal was submitted. Success in receiving and implementing the initial \$100,000 grant was followed by a \$1 million endowment and \$50,000 grant in January 2014, which triggered a name change to Osher Lifelong Learning Institute at NC State. A bid for a second \$1 million in funding during the 2015-16 program year was successful (\$950K was added to the existing endowment and \$50,000 was in the form of a grant).

### **What is OLLI's relationship with Osher?**

The Osher Foundation supports a network of 125 lifelong learning institutes for older adults located at colleges and universities, with at least one OLLI in all 50 states. There are three other OLLIs in North Carolina, at Duke University, UNC-Asheville, and UNC-Wilmington. The Foundation is not prescriptive regarding program structure and offerings, and the various OLLIs are quite diverse in programming, relationship with the university, fee structure, and overall structure. An Osher National Resource Center (NRC), based at Northwestern University, provides support for the network, links the individual institutes, organizes a national conference every 18 months, and disseminates information that helps the OLLIs thrive.

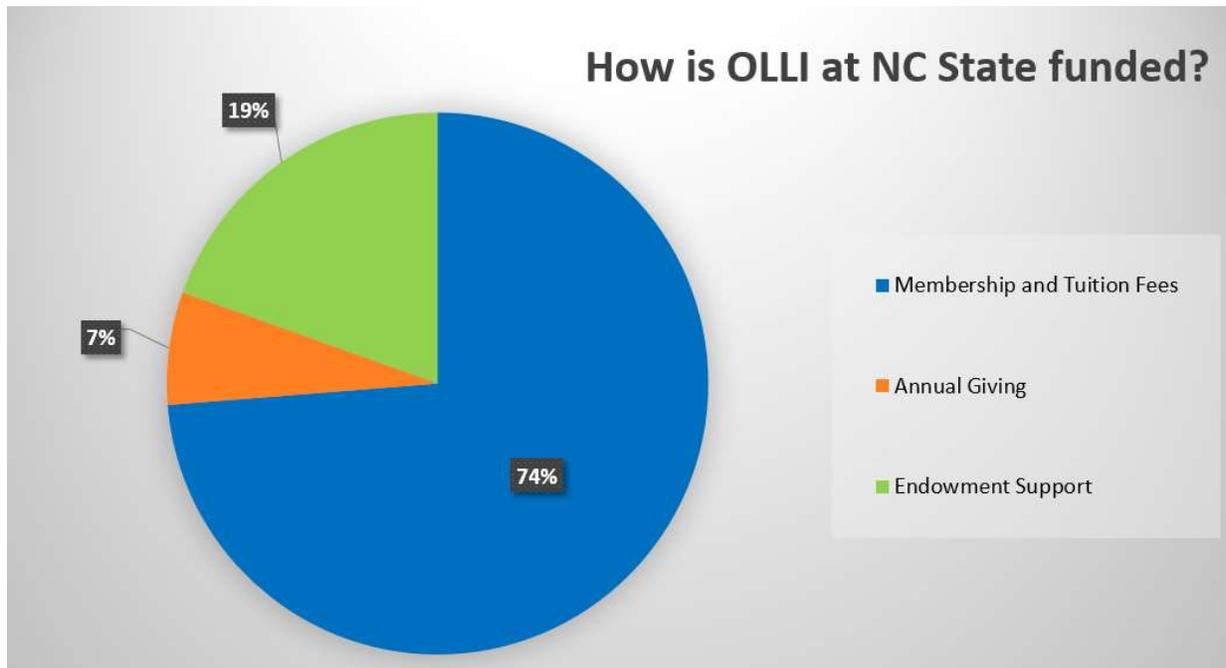
### **Why is a lifelong learning institute a good fit for NC State University?**

NC State is one of two land-grant universities in North Carolina (the other is NC A&T). The 1862 Morrill Act established land-grant universities, which would teach agricultural and mechanical arts, as well as military science. The intent was to make higher education accessible, more broadly, and to educate children of farmers, mechanics and other workers. Much has changed at NC State since its founding, but the land-grant mission is still central to NC State's work. Programs like OLLI, and its parent unit, NC State Continuing and Lifelong Education, are very much in keeping with this land grant tradition.

### **How is the OLLI program funded?**

OLLI is primarily funded by the fees that members pay and receives no state-appropriated or university funding to support its programs. The portion of funding received from the Osher Foundation makes up only a small portion of the annual operating budget, but the Osher funding provides the opportunity to pursue new and different program options and secures the long term financial health of

the program. The Osher Endowment is a fund that holds its principal in perpetuity and only pays out a small portion of earnings on that endowment each year. OLLI at NC State will remain a program funded primarily by the fees that members pay.



#### Other Helpful Information from OLLI By-laws & Strategic Plan

##### OLLI Mission

To provide opportunities for lifelong learning and enrichment for people over 50 through education, intellectual stimulation, social interaction, and community involvement.

##### Organization

The Osher Lifelong Learning Institute (OLLI) at NC State is a membership-supported, member-driven program that develops and delivers educational and enrichment opportunities for adults over 50. Direction for OLLI is provided by the Advisory Council and its Executive Committee. Leadership, management, program development, and member services are the responsibilities of the standing committees and the OLLI staff.

OLLI is a unit of the McKimmon Center for Extension & Continuing Education (MCE&CE), and as such, cooperates with other MCE&CE program units, various units of the university, and other adult education service providers in contributing toward the university’s mission of serving the people of North Carolina as a land-grant university.

##### Vision

The Osher Lifelong Learning Institute envisions:

- Keeping membership at our core
- Enriching lives
- Engaging our members and evolving to meet their needs
- Being an open and inclusive learning community

- Building partnerships that benefit the program, the university, and the greater Triangle community
- Appealing to the different generations of older adult learners present in our community
- Being largely self-supporting through fees, grants, endowments, and contributions from a wide variety of sources

OLLI's strategic plan is consistent with NC State's Core Values and Strategic Goals. OLLI at NC State will be updating our strategic plan in 2023-24; if you would like to contribute to this process, please look for opportunities to do so throughout the Fall 2023 Semester.

#### **NC State's Core Values (2021-2030):**

Consonant with our history, mission, and vision, NC State University affirms these core values:

- Excellence – in innovation, education and discovery, reflected in our unwavering commitment to pursue research and scholarship that solve problems and advance the greater good.
- Community – in how we respect and care for all at our university, value the contributions of every member of our Wolfpack, promote health and well-being, and help one another succeed.
- Inclusion – through a culture that promotes personal excellence and institutional equity by seeking, welcoming and supporting individuals and ideas from a broad diversity of backgrounds.
- Freedom – in thought, expression, inquiry and dialogue as a critical part of our mission to pursue and disseminate knowledge while promoting civil and respectful discourse.
- Integrity – in all we do, reflected in our commitment to the highest standards of ethical behavior and our dedication to transparency and accountability in governance.
- Collaboration – across colleges, disciplines and perspectives, and in how we partner with a broad range of organizations to find solutions to challenges at home and around the world.
- Sustainability – in our commitment to wise stewardship of resources, prudent financial planning and environmentally responsible operations.

#### **NC State's Strategic Goals:**

- Goal 1 – Empower students for a lifetime of success and impact.
- Goal 2 – Ensure preeminence in research, scholarship, innovation and collaboration.
- Goal 3 – Expand and advance our service to the citizens of the state and beyond – defining the standard for a 21<sup>st</sup>-century land-grant university.
- Goal 4 – Champion a culture of equity, diversity, inclusion, belonging and well-being in all we do.
- Goal 5 – Drive institutional effectiveness through transformative technologies, cutting-edge processes and actionable data.
- Goal 6 – Be recognized as the leading university for innovative partnerships, entrepreneurial thinking and applied problem-solving.

*The Osher Lifelong Learning Institute contributes to the achievement of all of the university's goals.*

#### **Impact of OLLI at NC State**

Each year, through course evaluations and other means, we receive hundreds of comments about the positive ways that the program impacts the lives of our members. Here are typical comments:

- "Being in an OLLI class adds quality to the experience of life. OLLI provides opportunities to make new friends, learn new things, and be part of something great going on in our community. I feel especially happy on days that I participate in OLLI."

- “I love OLLI. It has enriched my life so much...the people, the classes, the trips. There would be a huge void in my life without it.”
- “OLLI opens windows to our lives. Most of us are retired and we get to see and experience things that would not be available otherwise.”
- “OLLI provides great mental stimulation – the kind you can take home with you and think about for days.”
- “As a newcomer to the area, OLLI has given me an opportunity to meet new people. I find the interactions stimulating and I am encouraged to continue learning.”

#### **Your Impact on OLLI at NC State**

Thank YOU for volunteering! It is because of your contributions that OLLI at NC State has a significant impact on members’ lives. Your work makes a difference!