

ADMINISTRATIVE HANDBOOK

*Policies
and
Procedures*

Learning in Retirement Organization

University of Wisconsin Oshkosh

ADMINISTRATIVE HANDBOOK

TABLE OF CONTENTS

Policies and Procedures

Appendix A. Relationships Between the University of Wisconsin
Oshkosh and the Learning in Retirement Organization

Appendix B. Learning in Retirement Organizational Chart

Appendix C. Bylaws, Learning in Retirement Organization

Appendix D. Course Development Process

Appendix E. Learning in Retirement (Brochure)

ADMINISTRATIVE HANDBOOK

Learning in Retirement Organization

Policies and Procedures

INTRODUCTION

As a program of the University of Wisconsin Oshkosh, the Learning in Retirement Organization shall function in accordance with the goals and policies of the university, and in accordance with its own Bylaws.

To insure that these occur, this document provides procedures for operation, policies for governing, and designs for meaningful interaction of members. It is designed to enhance the Bylaws.

Article I. Name and Sponsorship

- A. The Learning in Retirement Organization is sponsored by the Office of Continuing Education and Extension at UW Oshkosh. Office space and meeting rooms shall be provided for the organization.
- B. The goals and policies of the organization shall be consistent with those of UW Oshkosh.
- C. The organization shall budget for and reimburse UW Oshkosh for office help and expenses.
- D. The Learning in Retirement Organization shall be a self-supporting non-profit organization.
- E. See Appendix A, "Relationships between the University of Wisconsin Oshkosh and The Learning in Retirement Organization." This document describes the collaboration between the university and Learning in Retirement Organization and delineates their respective roles and responsibilities.

Article II. Purposes of the Organization

- A. The organization is a group of older learners who participate in peer-led learning activities for intellectual, cultural, or social pursuits.
- B. The organization is nonpartisan, noncommercial, and nonsectarian.

Article III. Membership and Fees

A. The annual membership fee is for the 12 months beginning July 1 and ending June 30 the following year or beginning January 1 and ending December 31 of that year. The fee shall be recommended by the Administration/Finance Committee to the Steering Committee for approval at least 60 days before the Annual Meeting. Current fees are \$75.00 per year.

B. No memberships will be available for less than one year (July-June) or (January -December).

C. Membership is open to all adults who subscribe to the purposes of the organization

D. The annual membership fee covers attendance and participation in programs and classes. Members are encouraged to be involved. Additional charges may be necessary for some activities that are offered.

E. Members are given library privileges at the Polk Library at UW Oshkosh at no cost to LIR.

F. The Learning in Retirement Organization membership courses are provided by and for its members. The primary mission of the Learning in Retirement Organization is to sponsor educational activities. However, it shall be the policy of LIRO to provide opportunities for social activities.

G. Members may bring as guests, on a limited basis, persons who could be considered potential members.

H. The Learning in Retirement organization may also contract with Senior Living Centers to provide a group membership to all their residents. The contract will be negotiated by the President and the University liaison representative and the Living Center. The Steering Committee will authorize the final contract.

Article IV. Organization

A. The Steering Committee manages, coordinates, facilitates, and governs the operation of the Learning in Retirement Organization. This committee consists of the four elected officers, chairpersons of the standing committees or their alternates, and the past president. The staff liaison person from the university serves as a non-voting ex-officio member of the committee. The Steering Committee shall annually consider the Administrative/Finance Committee recommended goals and approve for the succeeding year the organizational and membership goals for the Learning in Retirement Organization.

1. The Steering Committee may approve having one or more representatives of the Learning in Retirement Organization attend any meeting or program sponsored by the Elderhostel Institute Network, and may approve the expenditure of Learning in Retirement funds to cover the cost of such attendance.
2. The Steering Committee shall approve a budget for the succeeding year before the end of the current fiscal year.

B. The standing committees of the Learning in Retirement Organization are the Curriculum Committee, Membership/Promotion Committee, and Administration/Finance Committee. (See Article V for more information on standing committees.)

C. The University of Wisconsin Oshkosh shall serve as the fiscal agent for the Learning in Retirement Organization.

D. The Nominating Committee, a three-member ad-hoc committee appointed by the president, proposes a slate of nominees for offices to be presented at the Annual Meeting. The Nominating Committee will be established in March.

E. Officers (President and Vice-president) shall be elected for a one-year term, with no more than two consecutive terms. Officers (Secretary and Treasurer) shall be elected for a one-year term, with no more than four consecutive terms. Any vacancy or unexpired term shall be filled by an appointment by the president for the balance of the term, except as provided in F and G2 below (vice-president).

F. Past President – The immediate Past President shall be a voting member of the Steering Committee. The Past President shall serve as acting Vice-President until the next election, in the event that office should become vacant.

G. Roles of Officers

1. President. The president of the Learning in Retirement Organization shall preside over meetings of the Steering Committee and General Membership meetings, and shall be the executive officer of the Learning in Retirement Organization. The president shall represent the organization before the public, either personally or through delegates. As senior officer of the organization the president shall sign all papers, orders, and documents requiring his/her signature, and perform such other duties as may be incumbent upon the office or that may be prescribed from time to time by the Bylaws or the Steering Committee.

2. Vice-president. The vice president of the Learning in Retirement Organization shall perform the functions usually attributed to the office, including special responsibilities as requested by the president. The vice-

president shall also assume the duties of the president in the absence of the president or a vacancy in the presidency.

3. Secretary. The secretary of the Learning in Retirement Organization shall keep accurate minutes of all meetings of the Steering Committee and the General Membership meetings, shall maintain the files of the organization, and shall assist the president with organizational correspondence. The secretary shall be responsible for issuance of notices and communications associated with the group. The secretary shall sign all documents as required by the office and shall perform such duties as may be assigned by the president or the Steering Committee.

4. Treasurer. The treasurer shall be a member of the Administration/Finance Committee and shall assist in preparing and monitoring an annual budget for the organization. The treasurer shall be the liaison person who works with the fiscal agent of the university. He/she shall present budget reports for meetings of the General Membership and the Steering Committee, and shall review semi-annually the receipts and expenditures of the Learning in Retirement Organization. The treasurer shall

- a. Assist officers and committee members in preparing and monitoring the organization's annual budget.
- b. Monitor the organization's revenue, including
 - a. Membership revenue;
 - b. Parking revenue; and
 - c. Special programs revenue.
- c. Monitor the organization's monthly expenditures, including
 - a. Reviewing expenditure reports prepared by Continuing Education's fiscal agents for committee members and the general members;
 - b. Ensuring that all expenditures are appropriate; and
 - c. Responding to revenue and expenditure inquiries from committee members, the general members and Continuing Education's fiscal agents.
- d. Prepare budget reports for officers, committee members and the general members.
- e. Work in partnership with the organization's clerical support person in Continuing Education to maintain accurate and timely records of paid memberships, parking permit payments and special program payments.
- f. Work in partnership with Continuing Education's fiscal agents to maintain accurate and timely records of revenue and expenditures.
- g. Learn and use WISDM (Wisconsin Data Mart), via the university's PeopleSoft Shared Financial System, to accomplish the objectives outlined above. (This requires the

ability to learn and effectively use Microsoft Windows applications.)

H. Role of University Liaison Person

1. A staff liaison person from the Office of Continuing Education and Extension at UW Oshkosh shall serve as a non-voting ex-officio member of the Steering Committee.
2. The liaison person shall serve as an advisor to all standing committees of the organization.

I. See Appendix B, "Learning in Retirement Organization." This is an organizational chart showing the structure of the Learning in Retirement Organization and the relationships that exist between and among the components.

1. See Appendix C, Bylaws for Learning in Retirement Organization. This is a copy of the Bylaws approved by the membership on June 9, 1999, and amended by membership on June 14, 2001.

Article V. Standing Committees

A. The Curriculum Committee is responsible for planning the courses and activities for the Learning in Retirement Organization and setting standards for the learning experiences. It shall solicit course suggestions from the members and develop topics of interest to members, recruit discussion leaders and instructors, coordinate schedules, and evaluate offerings. It shall provide a handbook for coordinators of courses, and establish a course development process.

1. The Curriculum Committee is responsible for selecting a tour coordinator for each semester.

B. The Membership/Promotion Committee is responsible for the recruitment of new members, publicity for the Learning in Retirement Organization, and the preparation and distribution of any brochures and newsletters that may be authorized by the Steering Committee. It will maintain a database of memberships and involvement, participate in information sessions, and promote the organization.

C. The Administration/Finance Committee is responsible for developing and monitoring an annual budget for the organization which they shall present to the Steering Committee for the succeeding fiscal year before April 30 of each year, recommending dues for members, setting membership goals, and organizing the Learning in Retirement Organization within the policies of the UW Oshkosh. It will develop and maintain an administrative handbook containing the policies and

procedures of the organization. The treasurer serves as a member of this committee.

D. Chairpersons of the standing committees (Curriculum, Membership Promotion, and Administration/Finance), are appointed by the Steering Committee. The chairpersons designate a minimum of five members for each committee. Committee members should be available to attend scheduled meetings that are called. The Committee chairperson may select a committee person to replace any member who has three unexcused absences. All committee appointments become effective after the annual meeting and terminate at the succeeding annual meeting.

E. Committee actions relating to policies and expenditures shall be forwarded to the Steering Committee for approval before becoming effective.

F. Each committee shall provide notice of and minutes of its meetings to other Learning in Retirement Organization committees. This is accomplished through a file in the office of the organization, Dempsey 317.

G. The conduct of all meetings will be governed by Robert's Rules of Order, latest edition. A quorum shall be the members present at a committee meeting.

H. Any ad-hoc committee authorized by the Steering Committee, shall be appointed by the president.

I. See Appendix D, "Course Development Process." This document was designed by the Curriculum Committee to assist coordinators who are developing courses.

Article VI. Annual Meeting

A. The full membership shall meet at least once a year.

B. Special meetings of the membership may be called by the president with 10 days of notice to the membership.

C. The date of the Annual Meeting shall be determined by the Steering Committee.

D. Voting decisions shall be determined by a simple majority of the membership present and voting.

E. Bylaws may be amended by two-thirds vote of the membership in attendance and voting at the Annual Meeting, provided the proposed changes to be voted upon were mailed to the members with the Annual Meeting notice thirty days prior to this meeting.

F. Officers will be elected at the annual meeting in spring and assume office at that time.

Article VII Office Operations

A. The University of Wisconsin Oshkosh shall provide office space for the Learning in Retirement Organization (presently Room 345B, Dempsey Hall), which will be available during building hours and available for Learning in Retirement Organization members.

1. The Learning in Retirement Organization office shall be the repository for organizational minutes and available to members for use in the room.
2. Learning in Retirement Organization members are encouraged to use the office for informal sessions.

Article VIII. Social Activities

A. The Learning in Retirement Organization may from time to time host social activities for the members.

1. Social Activities will be organized and / or directed by the Membership Committee. The Membership Committee in conjunction with the President will appoint a Social Director if deemed appropriate.
2. No funds raised by membership fees shall be used to purchase alcoholic beverages. Learning in Retirement funds held in the UW-Oshkosh Foundation may, with the approval of the Steering Committee, be used for that purpose.
3. The Steering Committee shall approve any social activities for which the Learning in Retirement Organization is host.

Article IX. Sponsored Tours

A. Field trips and tours sponsored by the Learning in Retirement Organization shall be approved by the Steering Committee and arranged through the Office of Continuing Education. The Office of Continuing Education will process all contracts and business arrangements, and payments will be made through the Office.

1. The Coordinator(s) of field trips or tours will provide information to the Office of Continuing Education so that trips and tours can be priced to cover all costs including administrative costs. A designated Learning in Retirement member may be appointed to work with the Continuing Education staff to assist in this task. The Finance/Administration Committee and the Treasurer will audit this activity to assure tour pricing is correct.

1. Persons registering for a course or tour for which there is a fee shall include payment of the fee with their registration. Registration is not complete without the fee payment. Any fee payments shall be refunded only if requested 10 days before the event. Refunds may be reduced by a fee to cover administrative costs.
2. Informed consent forms shall be signed and submitted by participants in advance of departure.
3. Participant health information, including name of person to be notified in an emergency, shall be on file with the organization prior to departure.

Article X. Outside Speakers

- A. It is a priority of the Learning in Retirement Organization to use course speakers and resource persons from UW-Oshkosh and the Learning in Retirement membership.
- B. It is the intent of the Learning in Retirement Organization to avoid any appearances of endorsement or preferences by the use of outside speakers.
- C. The Curriculum Committee or the course coordinator may invite outside persons to address a course when such person has a special qualification for the course issue.
- D. Although the Learning in Retirement Organization does not normally pay an honorarium or travel stipend for guest speakers, if a class coordinator wishes to request an honorarium or reimbursement for a speaker, prior approval must be obtained from the Curriculum Committee, and the matter passed by the Steering Committee.
- E. If the Learning in Retirement organization elects to pay a speaker at a special meeting such as the Annual meeting or the Fall Luncheon; that fee will be paid from the Speaker's Fund that has been established with the UW-Oshkosh Foundation.

Article XI. Revision Proposals

A. The operational policies for the Learning in Retirement Organization at the University of Wisconsin Oshkosh shall be created or revised using the following procedure:

1. Any member, officer or committee of the Learning in Retirement Organization may initiate an organizational policy or propose revision of an existing policy. Any policy request shall be referred to the Administration/Finance committee. That committee shall refer the request

to the appropriate Learning in Retirement committee which is most affected.

2. Any committee receiving a proposal from the Administration/Finance Committee shall consider the request and may disallow or evaluate the request and refer it back to the Administration/Finance Committee.
3. If the Administration/Finance Committee approves the proposal, the committee shall refer the proposal to the Steering Committee.
4. The Steering Committee shall either approve, revise or reject such policy proposal.
5. If the policy is approved, it becomes effective and becomes part of the Administrative Handbook.

Article XII. Policy Approval

- A. The Administrative Handbook, Policies and Procedures may be revised by a majority vote of a meeting of the Steering Committee.

APPENDIX A

RELATIONSHIPS BETWEEN THE UNIVERSITY OF WISCONSIN OSHKOSH AND THE LEARNING IN RETIREMENT ORGANIZATION

THE RELATIONSHIPS BETWEEN THE UNIVERSITY OF WISCONSIN OSHKOSH AND THE LEARNING IN RETIREMENT ORGANIZATION

INTRODUCTION

The Office of Continuing Education and Extension at the University of Wisconsin Oshkosh shall be the sponsor of the Learning in Retirement Organization. The Learning in Retirement Organization shall be a self-directed membership organization which was organized to provide non-credit courses and other learning opportunities for its members. As a program of UW Oshkosh, the Learning in Retirement Organization shall function in accordance with its bylaws, and in accordance with the goals and policies of the university.

This document provides the framework for the collaboration between the university and the Learning in Retirement Organization, and delineates their respective roles in the governance process. These guidelines will be reviewed annually by the Steering Committee of the Learning in Retirement Organization and the Office of Continuing Education and Extension at UW Oshkosh, on or before July 1.

THE ROLE OF THE UNIVERSITY

In working with the Learning in Retirement Organization, the University of Wisconsin Oshkosh shall assume the following roles and responsibilities.

1. The Office of Continuing Education and Extension at UW Oshkosh shall serve as the sponsoring unit and point of contact for the Learning in Retirement Organization and its members.
2. The university shall designate a liaison person from the Office of Continuing Education and Extension to serve as an ex-officio member of the Steering Committee of the Learning in Retirement Organization, and as an advisor to its other committees and activities.

3. The university shall provide in-kind support, such as meeting rooms, classrooms, office space and equipment, utilities, telephone usage, and audio-visual equipment.
4. The university shall serve as the fiscal agent for the Learning in Retirement Organization, shall serve as the depository, and shall annually make a financial report to the Learning in Retirement Organization. The deposits, expenditures, and financial records shall be handled in accordance with university policies.
5. The university publications office shall provide services to the Learning in Retirement Organization for promotional materials, announcements and other printed matter. The university publication editing processes and policies shall be followed for all Learning in Retirement Organization materials and printed matter.
6. The university shall provide library privileges at no charge to Learning in Retirement Organization members.
7. The university and the Learning in Retirement Organization shall work together in ongoing evaluation activities.
8. Learning in Retirement Organization members who possess a *Titan Card may ride Oshkosh Transit Systems buses at no charge, a service provided by the university.

*The university shall make Titan Cards available to Learning in Retirement Organization members, which affords LIR members the same privileges available to university students who are Titan Card holders. Titan Cards may be obtained at the Titan Card Office at Reeve Union for the established fee (currently \$8.00).

THE ROLE OF THE LEARNING IN RETIREMENT ORGANIZATION

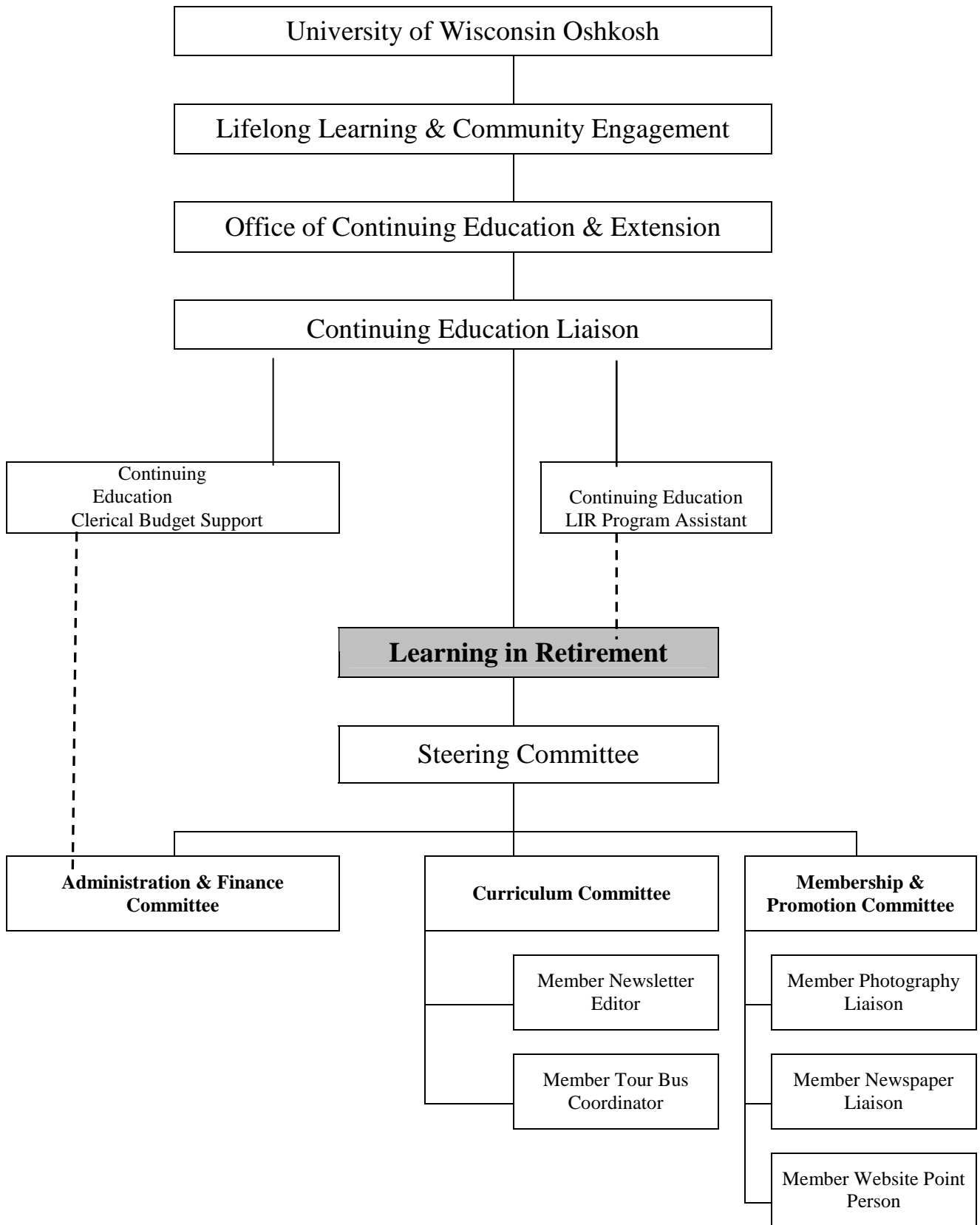
In working with the University of Wisconsin Oshkosh, the Learning in Retirement Organization shall assume the following roles and responsibilities.

1. The Learning in Retirement Organization is a program of the university and shall operate within the policies and procedures of the university.
2. A Steering Committee of the Learning in Retirement Organization shall manage, coordinate, facilitate, and govern the operation of the organization. The Steering Committee shall serve as the Learning Retirement Organization contact with UW Oshkosh.
3. The Learning in Retirement Organization shall develop, through its curriculum committee, non-credit courses and learning opportunities which shall be responsive to the interests of its members and which shall be cost-effective.
4. The Learning in Retirement Organization shall develop its own bylaws, administrative, and fiscal procedures, compatible with the framework of the university.
5. The Learning in Retirement Organization shall become self-supporting and shall then pay for direct costs of its operating expenses, such as supplies, class costs, postage, publications, and clerical support.
6. The Learning in Retirement Organization shall vigorously recruit new members.
7. The Learning in Retirement Organization shall prepare an annual budget and shall assume financial responsibility and be accountable to its members and the Office of Continuing Education and Extension at UW Oshkosh for its operations.
8. The Learning in Retirement Organization shall work with the university publications office in the development of promotional materials.
9. The Learning in Retirement Organization and the university shall work together in ongoing evaluation activities.
10. The Learning in Retirement Organization shall communicate its actions and plans to the university through the university liaison person.

Approved by the Steering Committee, Learning in Retirement Organization, November 20, 1997.

APPENDIX B

LEARNING IN RETIREMENT ORGANIZATIONAL CHART



APPENDIX C

BYLAWS LEARNING IN RETIREMENT ORGANIZATION

BYLAWS

June 9, 1999

LEARNING IN RETIREMENT ORGANIZATION

ARTICLE I. NAME AND SPONSORSHIP

Section 1. The name of the organization shall be LEARNING IN RETIREMENT ORGANIZATION.

Section 2. The Learning in Retirement Organization is sponsored by the Office of Continuing Education and Extension at the University of Wisconsin Oshkosh.

Section 3. The goals and policies of the organization shall be consistent with those of the University of Wisconsin Oshkosh.

ARTICLE II. PURPOSE

Section 1. The purpose of the Learning in Retirement Organization is to arrange non-credit courses and other learning opportunities for its members.

Section 2. The Learning in Retirement Organization is a group of older learners who provide intellectual stimulation, cultural enrichment, social interactions, and lifelong learning in a participatory peer-led organization.

ARTICLE III. MEMBERSHIP AND FEES

Section 1. Membership is open to all adults who subscribe to the purposes of the organization.

Section 2. Payment of annual fees constitutes membership for the year beginning July 1 and ending June 30 the following year. Initial membership will be from July through June, with the ability to prorate the membership fee for those new members who join throughout the year.

Section 3. Annual fees shall be recommended by the Administration/Finance Committee, and the Steering Committee of the Learning in Retirement Organization shall approve them.

Section 4. Members are entitled to participate in any of the classes or programs that are offered. Additional charges may be necessary for some activities.

ARTICLE IV. ORGANIZATION

Section 1. The Steering Committee shall manage, coordinate, facilitate, and govern the operation of the Learning in Retirement Organization. This committee will consist of the elected officers (4), the chairpersons, or their alternates, of standing committees (3), and the past president of the Learning in Retirement Organization.

Section 2. A staff liaison person from the Office of Continuing Education and Extension at UW Oshkosh shall serve as an ex-officio member of the Steering Committee and as an advisor to other standing committees.

Section 3. Officers of the Learning in Retirement Organization shall be a President, Vice-president, Secretary, and Treasurer. Officers will be elected at the Annual Meeting and assume office at that time.

Section 4. The length of term for the President and Vice President shall be one year with no more than two consecutive terms. The length of term for the Secretary and the Treasurer shall be one year with no more than four consecutive terms. Any vacancies or unexpired terms will be filled by the President for the balance of the term. Except that the Vice-President shall assume the duties of the President if there is a vacancy in the Presidency and the Past-

President shall serve as Vice-President in the event that office shall be come vacant.

Section 5. Standing Committees of the Learning in Retirement Organization shall consist of Curriculum Committee, Membership/Promotion Committee, and Administration/Finance Committee.

Section 6. The Nominating Committee, established in March of each year, shall be a three-member ad-hoc committee appointed by the president to propose a slate of nominees for offices at the Annual Meeting. Additional nominations may be made from the floor at the annual meeting.

Section 7. The University of Wisconsin Oshkosh shall serve as the fiscal agent for the Learning in Retirement Organization. The organization may receive monies by gifts or bequests for use by the UW Oshkosh Learning in Retirement organization. These funds will be deposited with the University of Wisconsin Oshkosh Foundation. The funds will be used only for the purposes designated by the donor. Authorization to use these funds will be by action of the Steering Committee. A procedure for withdrawal of funds will be established by the Steering Committee.

ARTICLE V. STANDING COMMITTEES

Section 1. The Curriculum Committee is responsible for planning the courses and activities for the Learning in Retirement Organization and setting standards for the learning experiences. It shall develop topics of interest to members, recruit discussion leaders and instructors, coordinate schedules, and evaluate the offerings.

Section 2. The Membership/Promotion Committee is responsible for the recruitment of new members, publicity for the Learning in Retirement Organization and the preparation and distribution of any brochures and newsletters that may be authorized by the Steering Committee.

Section 3. The Administration/Finance Committee is responsible for developing and monitoring an annual budget for the organization, recommending dues for members, setting membership goals, and organizing the Learning in Retirement Organization within the policies of UW Oshkosh.

Section 4. The following policies shall apply to the Curriculum Committee, Membership/Promotion Committee, and Administrative/Finance Committee.

Section 4A. Each committee shall consist of no less than five members from the membership.

Section 4B. Each committee shall provide notice of and minutes of its meetings to other Learning in Retirement Organization committees.

Section 4C. Chairpersons of standing committees will be appointed by the Steering Committee and begin duties upon appointment. Term of office is one year. Chairpersons shall not serve more than four successive terms.

Section 4D. Chairpersons designate the membership of their committees.

Section 4E. Committee actions relating to policies and expenditures shall be forwarded to the Steering Committee for approval before becoming effective.

Section 4F. Robert's Rules of Order, newly revised, shall govern the conduct of all meetings. A quorum will be the members present at a meeting.

Section 5. Any ad-hoc committees authorized by the Steering Committee shall be appointed by the president.

ARTICLE VI. ANNUAL MEETING

Section 1. The full membership shall meet at least once a year.

Section 2. Special meetings of the membership may be called by the president.

Section 3. Voting decisions shall be determined by a simple majority of the membership present and voting.

Section 4. Bylaws may be amended by two-thirds vote of the membership in attendance and voting at the annual meeting, providing the amended bylaws were presented in writing to the full membership thirty days prior to the annual meeting.

Section 5. The provisions of Article III, IV and V of these Bylaws shall not prevent the Steering Committee, by a majority vote of the Committee, from implementing a fee, course, action, program, or other initiative, notwithstanding the Bylaws, if deemed in the best interests of the Organization. Such an action by the Steering Committee may be in effect until the next meeting of the membership, at which time the members shall approve or reject the Steering Committee initiative as a proposed Bylaws change.

ARTICLE VII. LIABILITIES

Section 1. The Learning in Retirement Organization shall be non-profit and operated solely for the purpose given in Article II.

Section 2. No member shall be liable for the debts, liabilities, or other financial obligations of the Learning in Retirement Organization other than in proper exercise of his/her function as an officer of the organization.

ARTICLE VIII. DISSOLUTION

Section 1. In the event Learning in Retirement Organization ceases to function, any funds shall remain with the Office of Continuing Education and Extension at the University of Wisconsin Oshkosh.

As revised by the Learning in Retirement Organization membership at their June 9, 1999 Annual Meeting, and amended by membership on June 14, 2001.

APPENDIX D

COURSE DEVELOPMENT PROCESS

Course Development Process

I. Preplanning

A. The course idea

Questions to consider: Are others likely to be interested in this topic?

How do you envision this course?

Will it be a small discussion/learning group, a series of lectures, or something else?

How often will it meet?

How many sessions will it have?

Should enrollment be capped?

Can new participants come to single sessions, or should the course have the same group of participants throughout?

You might telephone one or two people as a preliminary exploration of your idea. You will need to solicit one or two members of the LIR curriculum committee to work with you on further planning and development of the course.

B. Complete the course proposal form

You will need to a) write an outline/overview of the course; b) select preferred format; c) decide how many sessions; d) suggest days, dates, time.

II. Development

A. Final schedule content. At this point the LIR Curriculum Committee will finalize the course schedule, the focus of each session, special needs, field trips etc.

B. Guest speakers or presenters. Be sure to confirm dates, times and topics with all speakers and presenters.

C. Promotion. Think of a title that is likely to stimulate interest in the course. The coordinator will write one or two descriptive

sentences about the presentation, which will be used by the curriculum committee in publicity material.

- D. Approval. The curriculum committee reviews proposed courses.

- E. Special needs/considerations. Will there be field trips? Should one or more of the course meetings be held at a special location? Generally the course coordinator will make the contacts and arrangements for these activities.

III. Arrangements

- A. Meeting room and set up. Rooms at the university will be reserved by Office of Continuing Education staff. Please note on the Course Proposal Form approximately how many participants are anticipated, and if there are any special needs at the meeting site. Please specify how the room seating should be arranged.

- B. Equipment. Office staff will reserve A-V equipment. Please note on the Course Proposal Form what equipment will be required.

- C. Materials. Course handouts can be duplicated at the university; originals should be turned in to the Office at least one week prior to the session.

- D. Refreshments. Normally, the course budget will not accommodate the purchase of refreshments for LIR courses, However, there may be special occasions for which members would wish to order coffee or snacks from the university food service. Office staff will complete the food order forms. Let the staff know at least 10 days prior to the event if you will need this service.

IV. Pre-registration

- A. Registration forms. At the beginning of each semester, the Office prepares a listing of courses to be offered that term. That listing will include a course registration form.
- B. Registration. Members will indicate the courses they plan to attend and return the form to the office. Office staff will maintain a list of registrants for each course. Course coordinators may check the enrollment or list of participants at any time by calling the office. The office will send a confirmation letter to each registrant prior to the first course meeting.

V. At the course

- A. Hospitality. The coordinator generally serves as a host at the course, particularly for the first meeting. He/she will greet people as they arrive and see to the distribution of handouts and other materials.
- B. Set up. The coordinator should check the room set up for the requested equipment and materials, and see that the presenter has what he/she needs. Arriving early at the location will give you time to make right anything that may need your attention.
- C. Punctuality. Start on time; stop on time.
- D. Introductions. The coordinator will welcome participants, introduce the topic and/or introduce the speaker.

VI. Wrap-up

- A. A brief thank-you note to guest presenters or speakers is in order.

APPENDIX E

LEARNING IN RETIREMENT (BROCHURE)

APPENDIX F

Corporate Membership Contracts