Membership Handbook

Your Guide to OLLI at CSULB

OLLI at CSULB
Building HS&D, Room 100 1250 Bellflower Blvd
Long Beach, CA 90840-5609
OLLI Office: 562-985-8237
OLLI Tech Support 562-985-2398
OLLI CSULB Web Site

OLLI – CSULB Membership Handbook

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What You Need to Know About OLLI at CSULB

What is the Osher Foundation?

[The Bernard Osher Foundation](), headquartered in San Francisco, was started in 1977 by Bernard Osher, a respected businessman and community leader. The Foundation seeks to improve quality of life through support for higher education and the arts.

The Foundation provides post-secondary scholarship funding to colleges and universities across the nation, with special attention to reentry students. It also supports a national lifelong learning network for seasoned adults. The Osher Lifelong Learning Institutes, operating on the campuses of 124 institutions of higher education from Maine to Hawaii and Alaska, have a National Resource Center at Northwestern University. In addition, the Foundation benefits programs in integrative medicine in the United States and Sweden, including centers at the University of California, San Francisco; Harvard Medical School and Brigham and Women's Hospital in Boston; the Karolinska Institute in Stockholm; Northwestern University; Vanderbilt University; the University of Miami; and the University of Washington. Finally, an array of performing arts organizations, museums, and educational programs in Northern California and in Mr. Osher's native state of Maine receive Foundation grants.

The Foundation has a nine-member Board of Directors, chaired by the Honorable Barbro Osher, Honorary Consul General of Sweden in California.

OLLI at CSULB

OLLI at CSULB a volunteer-supported, non-profit, tax-exempt organization established in 1996, operating in accordance with member-approved bylaws.

We operate under the guidance of a Governing Council which sets policies, approves budgets and oversees OLLI operations. Ultimate authority rest with OLLI members who elect the officers of the Governing Council (President, Vice President, Secretary and Treasurer) and act on any proposed amendments to the bylaws.

In addition to the elected officers, the Governing Council consists of two Members at Large and five working groups that conduct OLLI operations.

Relationship with the CSULB Community

OLLI is a Center within the College of Health and Human Services (CHHS). It fits well with the CHHS Departments, Schools and Centers which include:
- School of Nursing
- School of Social Work
- Department of Family and Consumer Sciences
- Department of Health Care Administration
- Department of Health Science
- Department of Kinesiology
- Department of Physical Therapy
- Department of Recreation and Leisure Studies
- Gerontology
- Center for Successful Aging
- LifeFit Center

OLLI works closely with these groups in the areas of student research, panel discussions, programs and class development.

Relationship with CSULB Foundations

The CSULB Research Foundation serves the mission of the University by supporting and engaging in research, entrepreneurship, community service, sponsored programs and the acquisition of private resources.
The Research Foundation provides OLLI services in the form of accounts payable, accounts receivable, cashiering, human resources, payroll and employee benefit services.
The CSULB 49er Foundation advocates for the people and programs at California State University, Long Beach, through the management of private support and the stewardship of donors.
The 49er Foundation provides support and management of OLLI's endowments and donors.

Our OLLI Organization

OSHER LIFELONG LEARNING INSTITUTE (OLLI)
AT CALIFORNIA STATE UNIVERSITY, LONG BEACH

	CHHS DEAN
GOVERNING COUNCIL	OLLI EXECUITVE DRIECTOR
WORKING GROUPS	OFFICE ADMINISTRATOR

Governance WG | Education WG | Technology WG | Communi-cation WG | Member Services WG | Office Staff | Office Volunteers

Instructors | Volunteers
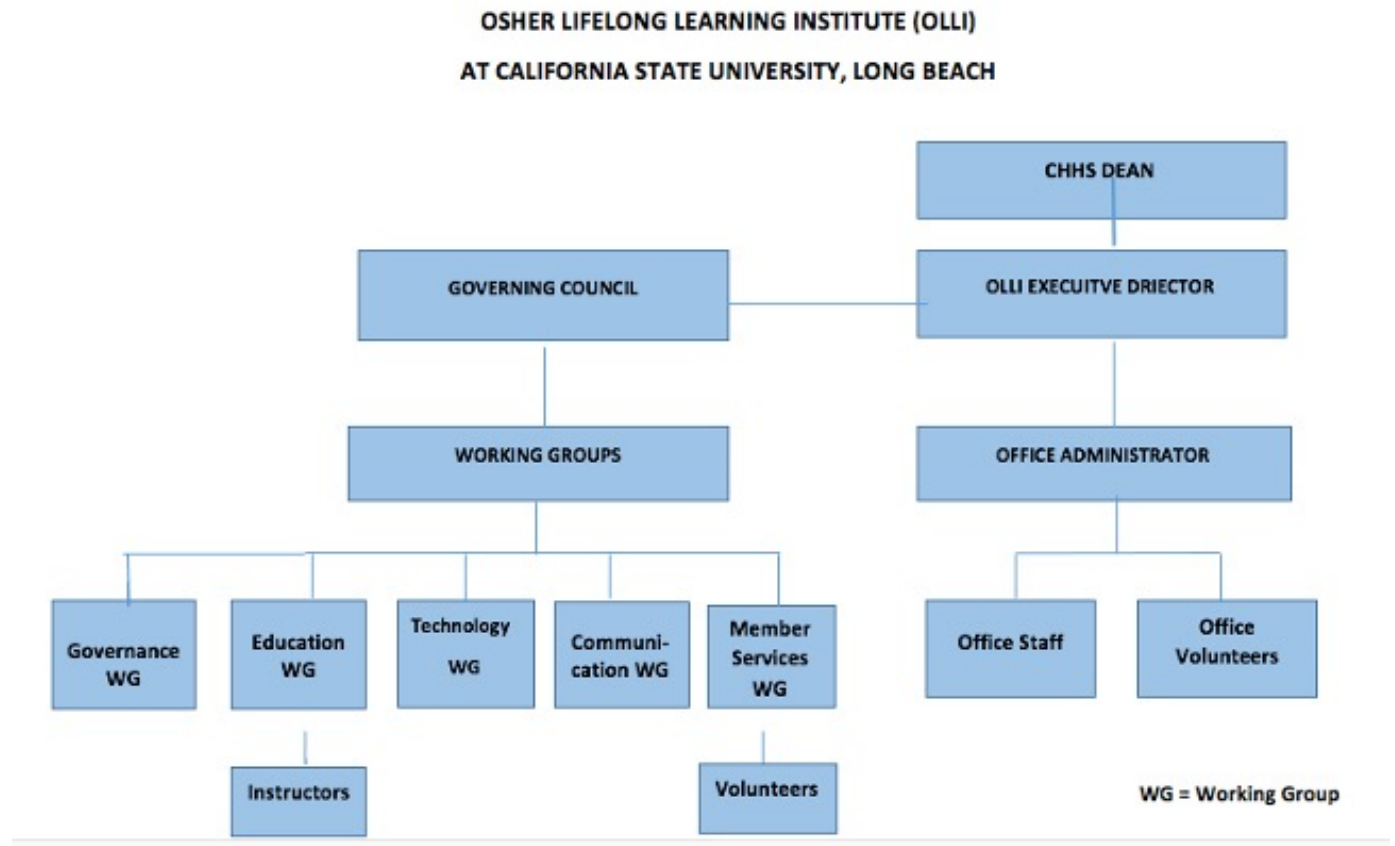
WG = Working Group

Our OLLI Working Groups

Board Members	**Working Group Leads**	**OLLI Staff**
President Glenn Libby glennlibby47@gmail.com	**Communications-The SUN** Open	**Executive Director** Barbara White (562) 985-8732 barbara.white@csulb.edu
Vice President Karin Covey karin.covey@csulb.edu	**Communications-PR/Marketing** Jan Stein jnelstein@aol.com	**Office Administrator** Rebecca Low (562) 985-7685 olli@csulb.edu
Treasurer Myles Newborn mnewborniii@gmail.com	**Education Group Co-Leaders** Donna Hawk dwhawk46@aol.com	**ProClass Support** Lee Sianez (562) 985-2398 (12:00 – 4:00 p.m.) ann.sianez@csulb.edu
Secretary Mary Kay Toumajian mktoumajian@gmail.com	Carolyn Estrada poko138@gmail.com	
President Emeritus Naida Tushnet Naidatushnet62@verizon.net	**Technology Group Co-Leaders** Kathy Winkenwerder kwwrdr@yahoo.com	
Member-at-Large Phyllis Spear funicia@aol.com	Wesley Peck wesdpeck@gmail.com	
Member-at-Large Joan Smith gsgirl64@yahoo.com	**Member Services Group** Barbara Norberg barbaraonthehill@verizon.net	

Find further information about these groups below.

Communications Working Group—publications, marketing and public relations and archives

Responsibilities:
- Produces The SUN—the quarterly newsletter/course catalog—and other publications as required, including marketing brochures and special event flyers.
- Engages in marketing and public relations activities including collaboration with other CSULB entities for mutual benefit.
- In conjunction with the MSWG, coordinates participation in University and community events (e.g., health fairs).
- Ensures posting of news and events to the OLLI website and social media links.
- Archives items of historical interest such as editions of The SUN, other publications, bylaws, policies and procedures, meeting minutes, and member surveys.
- Makes historical archives accessible to all members.

A Word About The SUN
From Rick Adams, SUN Editor

OLLI started out as the Seniors University. The publication was the Seniors University Newsletter. . . in short, The SUN
The SUN is OLLI's quarterly magazine/class catalogue. It has become noted for its bright yellow cover as well as for the contents. It is like a TV Guide since it gives you just enough information about classes to help you decide which ones are for you. We highlight classes that are new to OLLI and let you know a bit about the instructors. Our instructors are worth getting to know because they are teaching either their profession or their passion. Each issue also reports on recent activities and OLLI trips

Education Working Group—non-technology curriculum, special educational events, and satellite campuses

Responsibilities:

- Establishes the non-technology curriculum, including class offerings, leaders, locations, dates, times, and catalog descriptions.
- Evaluates the effectiveness of classes and class leaders using written class feedback from students and/or by peer review.
- Offers, in cooperation with the Technology Working Group, instructor training in classroom presentation techniques and technology.
- Plans and implements intersession programs, guest lectures, and special presentations.

Technology Working Group —technology lab and instructional technology

Responsibilities:

- Administers the technology lab in accordance with College and University computer use and security policies.
- Works with the College Informational Technology Consultants to support OLLI I/T equipment and software.
- Establishes and oversees curriculum for technology classes.
- Recruits instructors and coaches for technology classes and evaluates their effectiveness.
- Makes recommendations regarding the purchase and/or donation of I/T hardware and software.
- Offers, in cooperation with the Education Working Group, instructor training in classroom presentation techniques and technology.
- Provides technical assistants to help operate audio-visual equipment when requested by an instructor.
- Develops and maintains work-arounds so disruptions in the event of equipment failure.
- Oversees the process of equipment repairs, replacements, and enhancements
- Tracks and recommends emerging academic technology trends.
- Explores distance-learning in accordance with Osher Foundation standards.

Member Services Working Group—membership, volunteers, social events, and fundraising

Responsibilities

- Assists in recruitment and retention of members.
- Assists in recruiting volunteers to fill needs as identified by the Governing Council and working groups.
- Distributes The SUN and other membership recruitment materials as necessary to the greater Long Beach community.
- Organizes activities and events to welcome and orient new OLLI members.
- Organizes general membership meetings.
- In conjunction with the CWG, coordinates participation in University and community events (e.g., health fairs, Age Friendly University). vi. Organizes at least one volunteer recognition event per year.
- Organizes events such as socials, dedications, holiday celebrations, excursions, and memorials.

Governance Working Group
Membership

The Governing Council Vice President chairs this group.
Other members include at least the immediate past President of the Governing Council, the two elected Members at Large, and an OLLI member who is not a member of the Governing Council.

Responsibilities

- Initiates the strategic planning process and development of annual and long-term goals and presents these to the Executive Council for discussion and approval by the Governing Council.
- Oversees the nomination and election of Governing Council Officers.
- Oversees the mentoring and grooming of potential future leaders for the organization.
- Makes recommendations to the Executive Council of persons to fill Governing Council vacancies.
- Reviews the bylaws annually and recommends revisions to the Governing Council.
- Drafts and presents to the Governing Council for its approval revisions of existing policies and procedures and new policies and procedures that are deemed necessary.
- Conducts an annual review of the strategic plan and recommends modifications as needed.

Volunteer Opportunities

OLLI member volunteers are the creative source for all the courses, special events, social activities, publications and classroom services. Volunteering creates a more vibrant learning community and connects you to other OLLI members. It's a great way to make new friends and is personally satisfying and rewarding. Volunteer jobs vary in time commitment, skills needed and frequency. OLLI committee chairs and Board members are always on the lookout for volunteers.

Experience shows that the best way to get volunteers is the direct and personal approach. But you shouldn't wait to be asked. Take the initiative. To express your interest in being a volunteer, just email the lead of the working group you are interested in—we'd love it!

Doing Business with OLLI

General Information:

- Membership is open to all adults 50 years of age and older
- Membership is required to enroll in classes, and is $40.00 for a full year (Sept.-Aug.)
- Membership is pro-rated for half the year (April 1-Aug 31) at $20.00
- Tuition is $15.00 for each class
- Volunteer instructors receive complimentary membership for the academic year during which they teach.

Taking Classes

There are four easy steps to take classes at OLLI-CSULB:
1. Select Your Classes
   -Read the SUN on the OLLI website, and decide which classes interest you

2. Login to Your OLLI Online Account or Create a New Account If You Have Never Been a Member
   - For returning members, Login to OLLI at CSULB
     o Enter your username and password, then click Login
     o If you have forgotten your Username or Password, Click "Forgot Password" and enter your email.
     o You will be sent a link to reset your password.
     o Continue to Login
   - If you are totally new to OLLI: Create Account at OLLI
     o Fill in all required data and click "Submit" to create your OLLI account
     o Click continue to registration
3. Pay Your Membership Fee
     o Click the OLLI Annual Membership fee (everyone starts anew in September of each year). You are not able to take classes without a membership, and the membership fee for the year is $40.00
     o Enter data when prompted. Once you have entered your credit card data, click "Continue to Checkout" and review your payment before clicking "Submit Payment"
4. Register for Classes
     o Select the correct Session and search for classes by day
     o When you find the class you want, click "Register" and continue selecting classes to send to your shopping cart until you have all you want
     o When finished selecting classes, click "Checkout" and you will be guided through the credit card payment steps

   NOTE: Your online session is limited to 30 minutes, so watch the clock!

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Class Limits:
Enrollment in all classes will be on a first-come, first-served basis. Instructors have set their own class limits and we respect their preferences. We do not maintain a waitlist. We ask that you please keep OLLI financially healthy by registering and paying for all classes attended.

Computer Classes:
Some computer classes have minimum enrollments. If the enrollment minimum is not met one week before the first class meeting, the class may be canceled. Students will be notified and refunds can be issued or donated to OLLI.

Class Refunds:
In order to receive a tuition refund for a dropped class, you must notify the office before the second class meets. Call 562-985-8327 or send an email to OLLI@csulb.edu

Returned Checks:
CSULB charges a $7.00 per check fee for all returned checks. If your check is returned, you will be responsible to pay the amount of your check plus the $7.00 fee. The returned check fee may be increased by CSULB any time, and you will be responsible for the increased fee.

Scholarship Policy:
OLLI at CSULB offers scholarships for those who need financial assistance to participate. Anyone who submits an application and is approve for a scholarship will be eligible for a paid annual membership and discounted class tuition for that membership year. Recipients pay a 10% co-pay for each class taken. Scholarships must be renewed each year.

To request a scholarship application, please call the OLLI office at 562-985-8327. The scholarship must be submitted and approved prior to registering for classes.

Emotional Support/Assistance Animal Policy:
OLLI adheres to CSULB policy with respect to animals in the classroom:
- There is no requirement that owners register a Service Animal (dog) with the University.
- Owners of emotional support animals must register with Disabled Student Services including provision of a letter from a physician or psychologist verifying need.

A Word on Zoom Classes
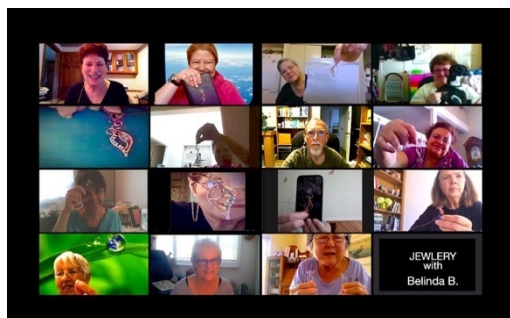
How to register for OLLI Zoom classes

Sign up for classes the way you always have by registering **online**, or by mailing a registration form and check made out to the CSULB Foundation. After you register, you will receive **confirmation emails** that includes a Zoom web address for each class you're enrolled in. The link will look something like this: https://csulb.zoom.us/x/11111111111.

FREE classes on how to Zoom

Online instruction will cover everything needed for you to get to class. There will be plenty of time before a session to become familiar with how Zoom works. Look for an OLLI email with Zoom training links

Getting ready for a Zoom class meeting

A few minutes before a class is due to start,

- Make sure your device is on and a power cord is handy
- Have the Zoom web address from the OLLI letter
- Be camera ready from the waist up!

Then follow the directions below.

And don't worry about how the class is conducted. Your instructor will tell you how his or her class will work. The format may seem a little strange at first, but after a while you will forget that you look like a member of the old Hollywood Squares game show.

Join a class meeting

The easiest way is to locate the Confirmation Letter that was sent from OLLI and use the class link to start Zoom. The Passcode and Meeting ID are included in the link. For Join a Meeting - use the ID and Passcode from this same letter to enter the meeting.

- Save the Letter in an email folder or copy it to a Word doc/Notepad file on your desktop.
    - **The same link will be used for all weeks.**
- Create a calendar meeting and include the Link.
- If you cannot hear the audio or cannot get into the meeting, close all Zoom windows and try the link again.

Navigating in OLLI@CSULB

If you have general inquiries, like:

- Want to know when classes start?
- Want to know when registration starts?
- Need to check on status of a refund?
- Want to request a print copy of *The SUN?*

Call the OLLI Office at: 562-985-8237

If you have questions on a class or are having difficulty registering online:

- Is a specific class full?
- Need to drop or transfer a class
- Need assistance in logging on to the registration web site as a returning member or as a new member

Call Lee Sainez at: 562-985-2398

If you have a comment on your OLLI experience, like:

- To give a KUDO
- To lodge a complaint

Contact Barbara White at: 562-985-8732 or
Dr. Barbara White

If you have questions on parking on CSULB campus, like:
- How do I get a parking pass?
- How much does parking cost?
- Where can I park?
- How do I use my ADA parking placard at CSULB?

Contact CSULB Parking Office at: 562-985-4146

If you need information about the LifeFit Center:

Call: 562-985-2015 or
Contact Ayla Donlin 562-985-2005 or
Ayla Donlin

If you need to contact OLLI's Members at Large:

- Gary Hoyt – 562-494-2960 or ghoyt1@verizon.net
- Phyllis Spear – 562-985-0230

Calendar for 2021-22

Session Dates

Session	Dates	Duration	Registration
Fall '21	Monday, October 4 - Saturday, November 20	7 weeks	September 13
Winter '22	Monday, January 3 - Saturday, February 26	8 weeks	December 6
Spring '22	Monday, April 4 - Saturday, May 28	8 weeks	March 7
Summer'22	Tuesday, July 5 - Monday, August 29	8 weeks	June 13

HOLIDAYS — NO OLLI CLASSES — OLLI OFFICE @ CSULB CLOSED

Holiday	Date
Labor Day	Monday, September 6, 2021
Veterans' Day	Thursday, November 11, 2021
Thanksgiving Holiday	Thursday-Friday, November 25-28, 2021
Winter Holiday	Thursday, Dec. 24 – 26, 2021
New Year's Day	Saturday, January 1, 2022
Martin Luther King Day	Monday, January 17, 2022
Cesar Chavez Day	Thursday, March 31, 2022
Memorial Day	Monday, May 30, 2022
Independence Day	Monday, July 4, 2022

CSULB Classroom Location and Map

Osher Lifelong Learning Institute at CSULB
1250 Bellflower Blvd. , HS&D 100-5609
Long Beach, CA 90840-5609
(562) 985-8237

Find the OLLI office in the Human Services and Desing building at CSULB by going South on Palo Verde Avenue until it dead-ends at State University Drive, and turn right onto State University Drive. Parking is available in the Foundation lot or along State University Drive. (See parking information.)

Walk north from State University Drive, cut through the Design (DESN) Building, cross a small street, and enter the HSD Building. The OLLI office will be on your right as soon as you enter the building.
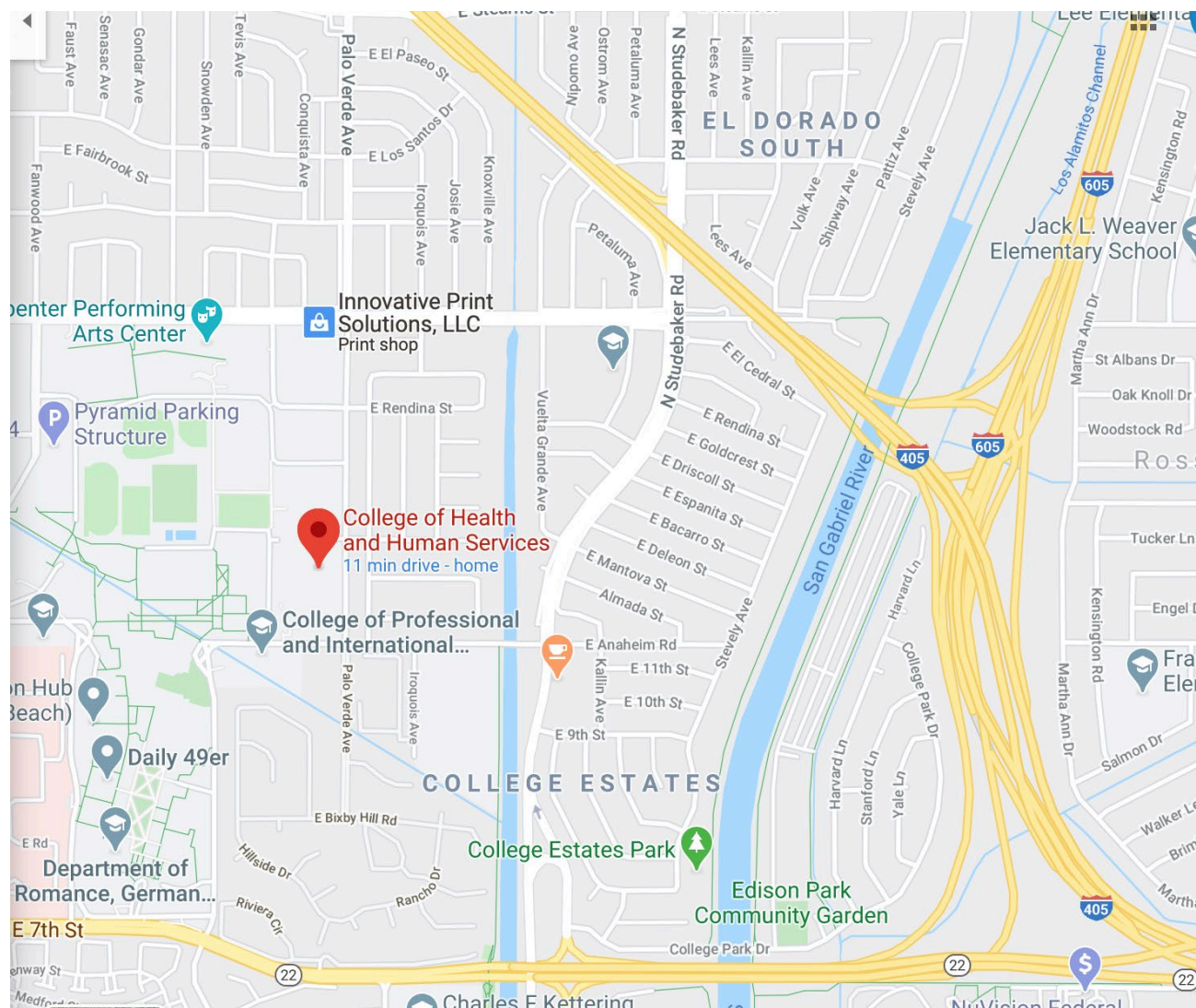
Pine Avenue Classroom

OLLI Pine Avenue (PA)
737 Pine Ave, Suite 202
Long Beach, CA 90813
Enter from Solano Ct.
562-436-2100
Park Pacific Tower (PA-To) is directly across Solano Court
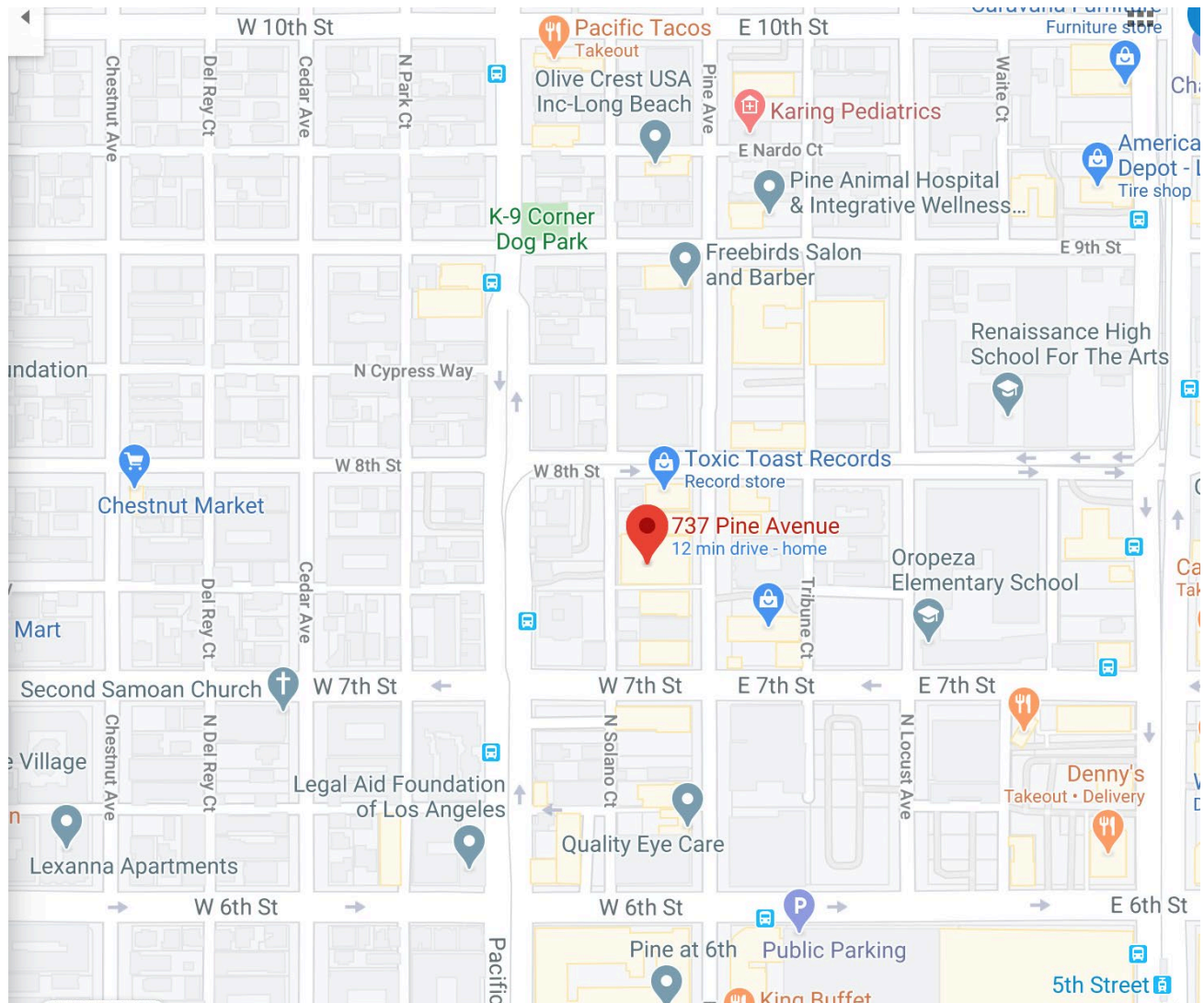
American Gold Star Manor

American Gold Star Manor (AGSM)

3021 Gold Star Drive
Long Beach, CA 90810
Recreation Hall
(near Spring St. and Santa Fe)

The Alpert Jewish Community Center (JCC)

The Alpert Jewish Community Center (JCC)
3801 East Willow Street Long Beach, CA 90815
562-426-7601
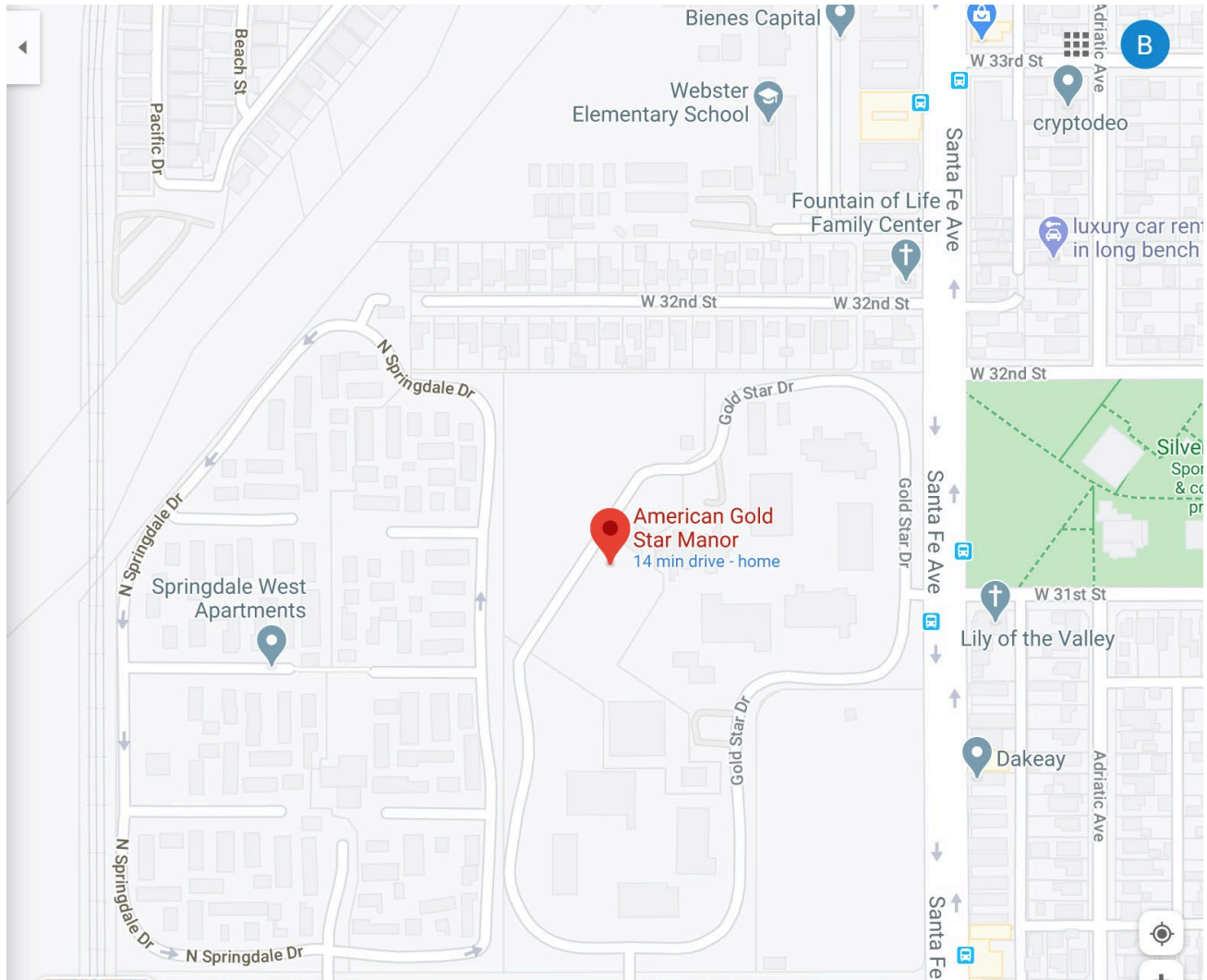
St Isidore Historical Plaza

St Isidore Historical Plaza
10961 Regan St. Los Alamitos, CA 90720
562-596-9918
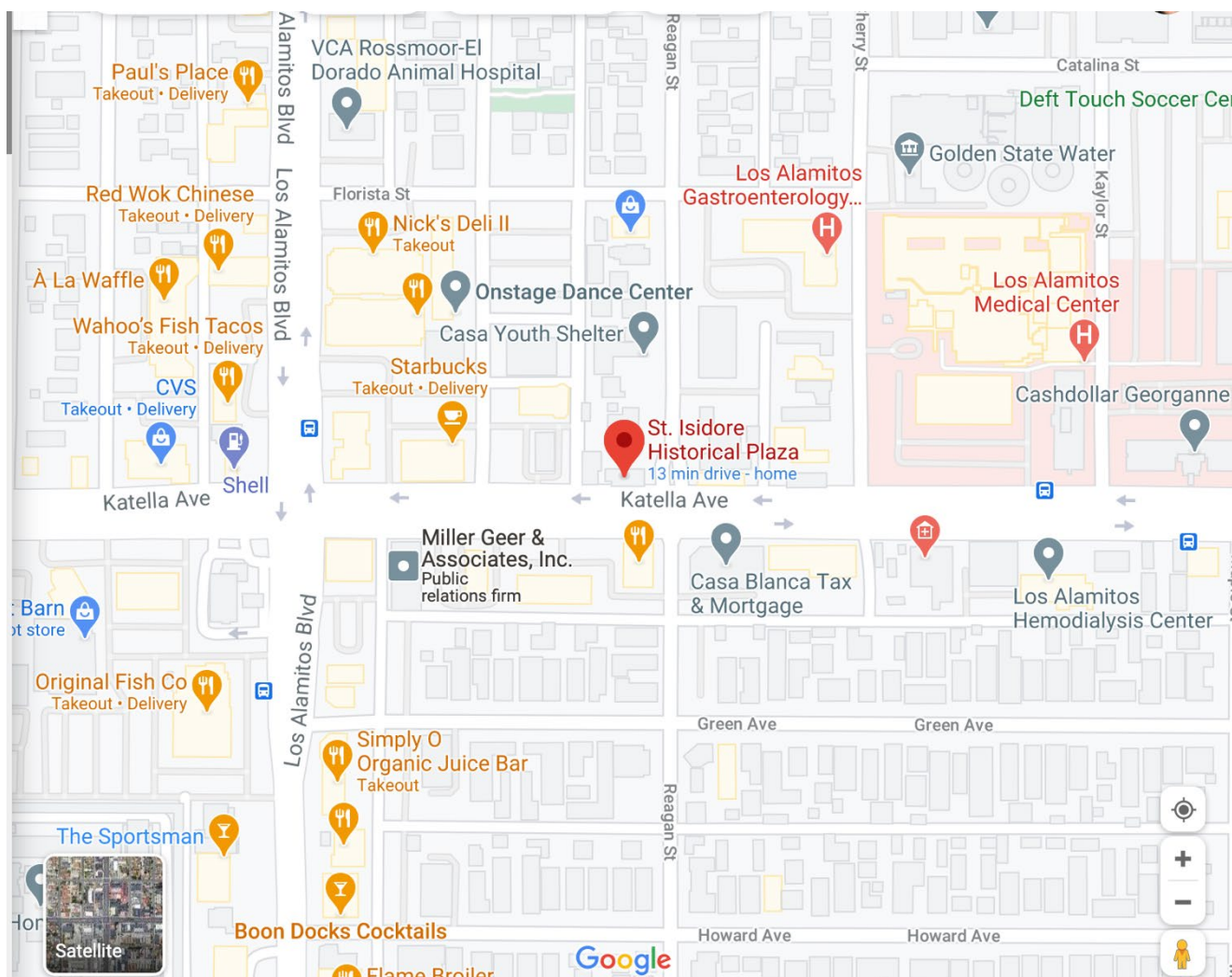
Long Beach Bridge Center (LBCC)

Long Beach Bridge Center
4782 Pacific Coast Highway,
Long Beach, CA 90804
562-498-8113
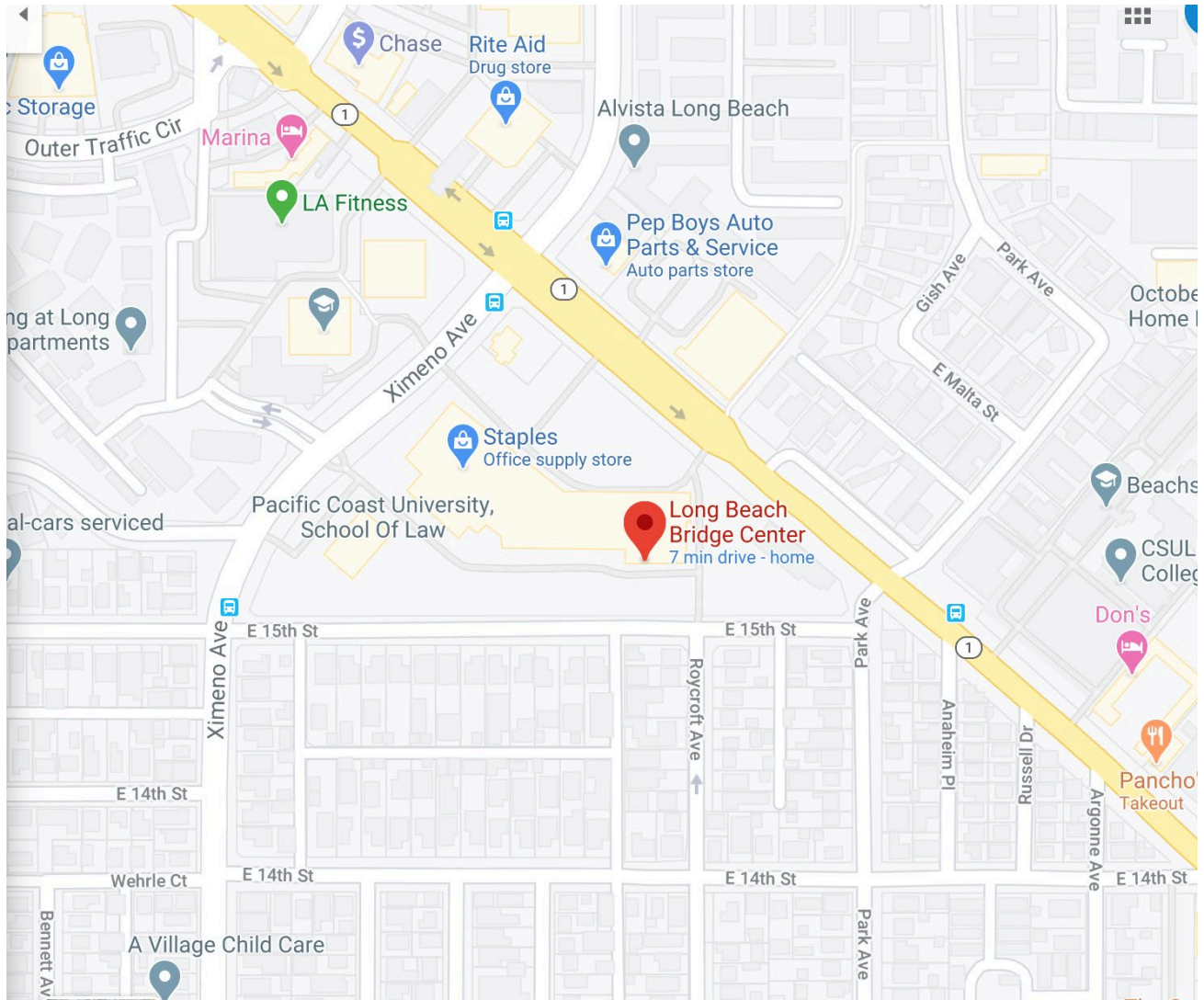
Being Part of CSULB

CSULB Identification Card

Benefits of a CSULB ID Card

Once an OLLI Member registers his/her ID card at the front desk of the CSULB library, he/she has library privileges.

The University ID Card also enables OLLI Members to obtain ticket discounts to many theater and music performances at the Carpenter Performing Arts Center, athletic events, and free admission to the University Art Museum. Performance venue tickets can be obtained at the University Box Office which is located on the North side (facing Atherton Street) of the Carpenter Performing Arts Center.
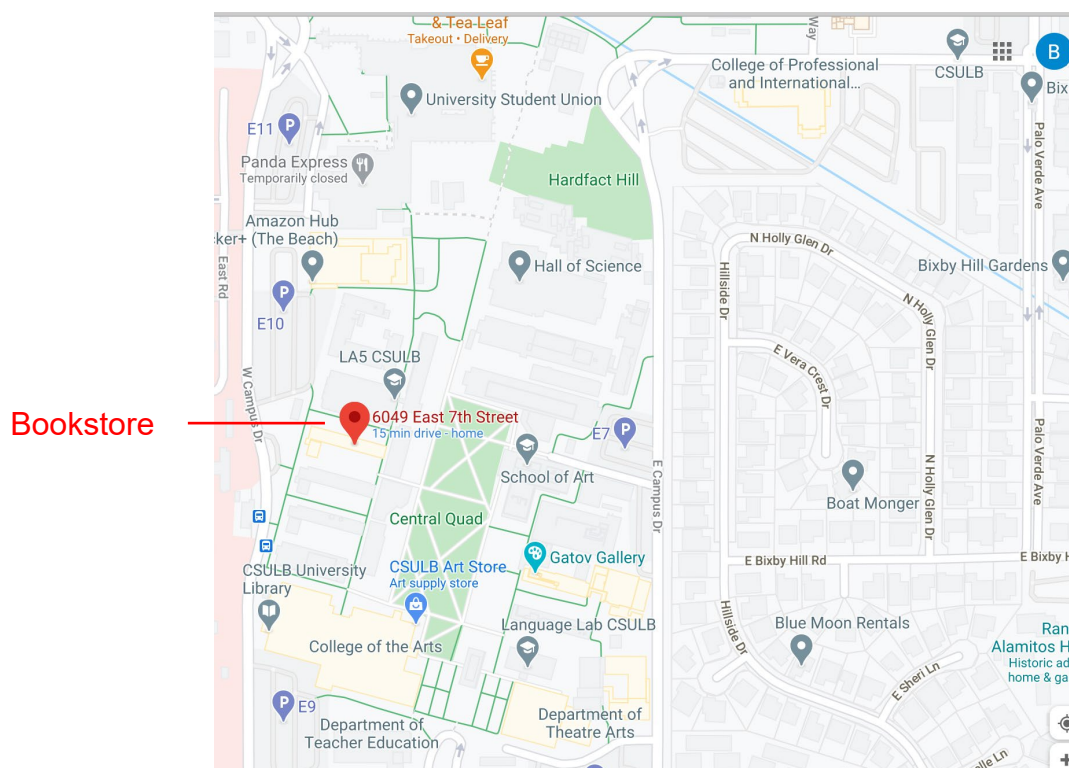
How To Get a CSULB ID Card

Most OLLI members can obtain a free CSULB Identification Card at the ID Card Services Office which is located inside the University Bookstore Building, on the second floor.

Present a current OLLI Name Tag or a copy of the Registration form plus a photo ID such as a driver's license to obtain this card. ID Card Services office: **562-985-7388** or email ID Card

Campus Map

Campus map labels:
- **Carpenter Center** — CPAC
- **General Parking Lots** G 12, 13, 14 & Parking Structures
- **Archery Fieldhouse**
- **KIN 107/110** LifeFit Center — KIN
- **OLLI Office** — HSD
- **Outpost**
- **Brotman Hall** for Parking pass — BH
- **Employee Lot E6** with 9 ADA
- **Dining** at the Student Union — USU
- **Foundation Parking Lot** — FND
- **State University Drive** No need to pay in green space if you have blue DP placard
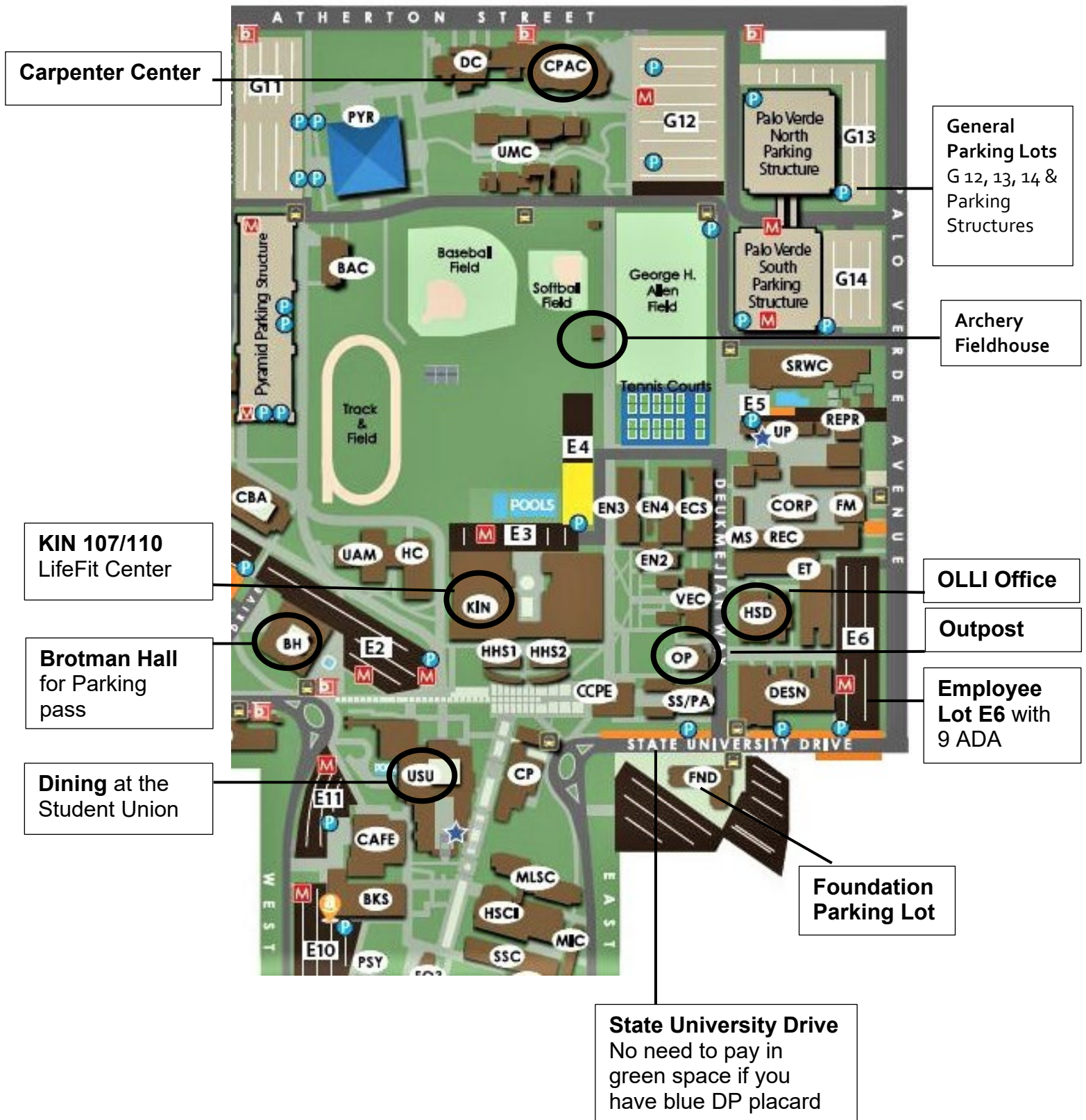
Campus Dining Options

University Dining Plaza: The Chartroom, Beach Walk, Opah! Greek Café, Panda Express, Nugget Grill & Pub, Nugget Express, Squeeze Me, Starbucks, Outpost Grill, Hibachi San

University Student Union: Carl's Jr, El Pollo Loco, Candy Corner, El Pollo Loco, Robek's, Sbarro, Subway

University Library: Starbucks

Some eating places offer a slight discount upon presentation of Student I.D.

LifeFit Center

Life Fit Center Information

- Our vision is to inspire our community to a lifelong commitment to wellness. We aim to promote intergenerational relationships between our members and LBSU students, staff, and faculty.
- We invest in education and research as a foundation of our purpose. We take pride in preparing high-quality health and fitness professionals by providing internship and career development opportunities for LBSU students. We offer research and community engagement opportunities for students and faculty.
- We foster a community that inspires healthy behaviors and empowers longer, healthier, happier lives. We know the names of our members, our staff, and our interns, and we are invested in the well-being of those in our community. We connect with local and national organizations and health professionals to strengthen our network.
- We cultivate wellness because we know that well-being stems from a sustainable lifestyle of healthy behaviors. We provide multidisciplinary and innovative health, fitness, and social programs that promote a lifelong commitment to wellness.

Location

- The LifeFit Center @ The Beach is located in the Kinesiology Building (northeast corner). Please use Deukmejian Way to access Parking Lot E4.
- **Phone:** 562-985-2015

Pricing
- Community Rate - $30 monthly
- OLLI Member - $20 monthly
- Alumni Association/Legacy Society Members - $20 monthly
- Silver Sneakers – Free. LifeFit will need your 16-digit SilverSneakers membership number to begin your membership.
- Parking is a separate fee. Members must obtain a Parking Request Form from the LifeFit Service Desk in order to purchase parking at Brotman Hall.

- Only LifeFit members who are not employees of CSULB are eligible to purchase monthly parking through the LifeFit Center.

What You Need to Know About Transportation

Campus Parking Information

How To Get a Campus Parking Permit

Purchase parking at the Financial Services Cashier located in Brotman Hall or you may purchase parking online at: https://csulb.t2hosted.com/Account/Portal

Cost

- During the registration period for each session, OLLI participants can purchase CSULB Community Parking Permits for $40.00 per calendar month.
- Parking Permits may be used in Lots 11A, 11B, and parking structures 2 and 3 off Palo Verde Avenue south of Atherton Rd.
- Note that Lot 11C is a restricted lot. There are more lots on campus with General Parking spaces where Community Parking Permits are allowed. None are as close to OLLI.
- Community Parking Permits are valid in many lots on Campus (see maps) as well as Employee Lots after 5:30 p.m. and all day on weekends.

Things to Know About Parking

- Receipts are not issued for any permit purchased at a kiosk. The final message will be "Transaction – Virtual Permit"
- OLLI students possessing a California DMV-issued Disabled Parking Permit can use their placards, a Community Parking Permit, and a permit from Disabled Student Services to park in Lot 9, closest to OLLI classrooms. A gate code will be issued if the OLLI Office has a copy of the DMV permit on file. The DMV issued placard and the Community Parking Permit and the permit from Disabled Student Services must all be displayed when parking in Lot 9.
- OLLI students cannot park in an Employee Only or restricted space.
- For additional information on parking at CSULB, go to: https://www.csulb.edu/parking-and-transportation-services

Parking Map

Campus Shuttle Information

Long Beach Transit Routes

Long Beach Transit Senior Tap Card Information

- Seniors 62 years or older qualify for a Senior TAP Card. There is no charge for the card itself, but you must supply a full-face photo (1" X 1-1/4" or 2" X 2") along with valid ID showing proof of age (California ID, California Driver's License, passport, or a birth certificate accompanied by any photo ID).

- You can apply for your Senior TAP Card or at any Metro Customer Center. Seniors may also mail in copies of the required documentation and a full-face photo to the TAP Reduced Fare Office, One Gateway Plaza, Mail Stop: 99-PL-4, Los Angeles, CA 90012-2952.

- **Long Beach Transit phone: 866-827-8646.**

Other Transportation Options

Uber
Get a taxi, private car or rideshare from your mobile phone. Uber connects you with a driver in minutes. Use our app in cities around the world.

Lyft
Rideshare with Lyft. Lyft is your friend with a car, whenever you need one. Download the app, and get a ride from a friendly driver within minutes.

Both Ridesharing plans use a credit card and Smart phone App to use.

Access

- For those who have certain disabilities and are unable to use the fixed route bus system, the Americans With Disabilities Act (ADA) provides for complementary paratransit services. These services are provided by Access Services, Inc. To receive an application, call 1-800-827-0829 (TDD 1-800-827-1359).
- Access Services is the county-wide complementary paratransit service which is required under the federal Americans with Disabilities Act (ADA). This agency provides mobility for those persons who are not capable of using regular fixed route transit service in Los Angeles County, including Long Beach Transit's service area. Representatives of the fixed route transit systems in Los Angeles County sit on the ASI Board of Directors.
- To be served by ASI, a person must become certified as eligible. Eligibility is determined by ASI based on several components which include an application, interview, and a mobility evaluation. For more information, contact ASI at (213) 270-6000 or www.asila.org.

Dial-A-Lift

Long Beach Dial-A-Lift is a local paratransit program for residents of Long Beach, Lakewood and Signal Hill. Members of Dial-A-Lift must be 18 years of age or older, have a permanent mobility impairment that does not allow them use of the Long Beach Transit fixed-route bus system. You may apply for Long Beach Dial-A-Lift membership by calling Long Beach Dial-A-Lift at 562-591-8753.

Appendix

OLLI By-Laws

OSHER LIFELONG LEARNING INSTITUTE AT CALIFORNIA STATE UNIVERSITY LONG BEACH

COLLEGE OF HEALTH AND HUMAN SERVICES

BYLAWS Article I—Name

The name of this Center shall be: "Osher Lifelong Learning Institute at California State University Long Beach" (OLLI at CSULB) hereafter known as OLLI.

Article II—Purpose

Section 1—Mission Statement

OLLI at CSULB provides educational opportunities, encourages an active lifestyle, and promotes social opportunities for older adults.

Section 2—Vision Statement

We celebrate the positive aspects of aging through a community that fosters personal growth, promotes individual empowerment, and nurtures human potential through lifelong learning.

Article III—Relationship to California State University Long Beach Section 1—CSULB College of Health and Human Services

OLLI is a Center under the direction/guidance of the Dean of the College of Health and Human Services, hereafter known as the College, and of the Executive Director of OLLI.

Section 2—CSULB Foundations

The CSULB Foundations provide financial services for a fee as determined by the Foundations.

Article IV--Membership

Section 1—General Membership

OLLI – CSULB Membership Handbook

Membership in OLLI is open to all persons age 50 or over who subscribe to the spirit and purpose of OLLI and are willing to abide by the provisions of its bylaws and policies.

1.1 A member shall be any person who qualifies for membership as described above and joins during the membership year.
1.2 Annual membership year shall be for the period of October 1 through September 30.

Section 2—Membership Benefits

Member benefits include the following:

2.1 Voting privileges.
2.2 Opportunity to serve OLLI as a volunteer.
2.3 A University identification card, which allows use of the University library and other selected University facilities.
2.4 Seminars, special events, travel and tour opportunities.
2.5 Other programs or services designated by the University, the College, or the Governing Council.

Section 3—Fees/Tuition

3.1 Membership fees and tuition will be established by the Governing Council.
3.2 Such fees should fund budgetary and financial requirements of OLLI.
3.3 All fees shall be paid at time of registration for membership or classes.
3.4 Additional fees may be collected, as needed, to pay for instructional or other materials not covered by regular tuition fees.

Article V—Advisory Board

Section 1—Purpose and Function of Board

The purpose of the Advisory Board is to advise the College administration and the Governing Council as follows:

1.1 Promotes the mission and vision of OLLI.
1.2 Provides support for members of the Governing Council.
1.3 Acts in a collaborative partnership with the Executive Director and Governing Council and advises on policy development and interpretation.
1.4 Acts as an advocate supporting the interest and needs of OLLI.
1.5 Provides advice and assistance in curricular and fiscal matters.
1.6 Communicates community concerns and interests to the Executive Director and the Governing Council.

Section 2—Selection of Advisory Board members

2.1 One member of the Advisory Board shall be a faculty member and one member a student from the College.

2.2 Additional members serve by invitation from the Dean of the College upon the recommendation of the Advisory Board, and in accordance with Advisory Board Policies and Procedures.

Article VI—Executive Director

The Executive Director is an employee of the University reporting to the Dean of the College or designee. The Executive Director is appointed by the Dean with the participation of representatives of the Governing Council in the selection process. The term of appointment is three years, with renewal based upon funding and satisfactory performance as determined by the Dean or designee in consultation with the Executive Council.

Responsibilities and Duties

1. The position has overall responsibility for the successful implementation of OLLI's programs, provides leadership to other staff in carrying out policies of the organization, and ensures that the organization's objectives are effectively pursued.
2. The Executive Director:
    i. Acts as liaison between OLLI and the College, other University entities, and the Osher Foundation.
    ii. Is responsible for all program aspects, in consultation with the Executive Council, Governing Council, and OLLI membership.
    iii. Supervises fiscal management of OLLI.
    iv. With the Dean of the College, is a signatory on all financial transactions.
    v. Coordinates OLLI collaborative relationships with the University, external agencies, community partners, volunteers, and the public.
    vi. Develops resource and grant opportunities to support program development.
    vii. Advocates for OLLI in on- and off-campus settings.
    viii. Maintains shared governance between the campus and the Governing Council.
    ix. Assists the Governing Council in achieving OLLI strategic goals.
    x. Oversees all operations and administration (staff, volunteers, programs, and services).
    xi. Serves as an ex officio member of and works in collaboration with the Executive Council, Governing Council, and all working groups.
    xii. In collaboration with the Governing Council, periodically surveys the membership to gather member demographics, assess program satisfaction,

Article VII—OLLI Governing Council Section 1—Purpose and Function of the Council

1.1 The Board of Directors of OLLI shall be known as the Governing Council and shall consist of the Executive Council members, the leader of each Core Working Group, and two elected members at large.

1.2 The purpose of the Council is to provide a governing body for OLLI. The Governing Council, in collaboration with the Executive Director, shall be responsible for decisions concerning policy, fees, approving the annual budget, assigned strategic plan goals and updates, hiring of staff, and curriculum. Council decisions shall be determined by a

majority vote of its members who are present and voting. Votes may only be taken if the quorum requirements of Article IX, Section 2, of these bylaws are met. In the event a Core Working Group has co-leaders, all are entitled to attend Governing Council Meetings and participate in the business of the Governing Council; however, each Core Working Group will have only one vote which shall be apportioned evenly between the co-leaders present and voting.

Section 2—Officers and Responsibilities

The Officers of the Governing Council will be comprised of the following and will have full voting privileges with the exception of the President who will vote only in the event of a tie:

2.1 President
Responsibilities, in collaboration with the Executive Director:

2.1.1 Policy Administration
   i.   Ensures that the organization functions in a lawful and ethical manner and in accordance with Policies and Procedures established by the Governing Council and the University.
   ii.   Provides leadership in determining/reviewing the organization's mission, plans, and objectives.
   iii. Ensures that organizational activities are established within appropriate time frames.
   iv. Contributes to and reviews required reports of OLLI activities to the Osher Foundation and the Academic Senate.

2.1.2 Board Leadership
   i.   Presides over all general membership meetings as well as Executive and Governing Council meetings.
   ii.   Appoints or approves working group leaders.
   iii. Serves as an ex-officio member of all working groups.
   iv. Maintains a cooperative, mutually supportive relationship with the Executive Director.
   v.   Attends meetings of the Advisory Board.

2.1.3 Public and Community Relations
   i.   Promotes the goals of the organization.
   ii.   Represents OLLI at official functions.

2.1.4 Leadership Development
   i.   Promotes the development of selected volunteers to assume future key leadership roles.
   ii.   Assists in identifying key persons in the community who could serve the organization.

2.2 Vice-President
    i. Performs all duties of the President in his/her absence.
    ii. Performs other duties as requested by the President.
    iii. Serves as leader of the Governance Working Group.

iv. Coordinates activities of ad hoc working groups.
v. Acts as an ex-officio member of all Core Working Groups.

2.3 Treasurer —In consultation with the Executive Director: Ensures that all Research and 49er Foundation and CSULB financial administrative procedures are followed.

i.   Ensures that all financial reports accurately reflect the status of the organization including the receipt, deposit, and disbursement of funds.
ii.   Provides quarterly financial status reports to the Governing Council.
iii.   Ensures that all legal and insurance obligations are properly met in accordance with CSULB Foundations and University policies and procedures.
iv.   Prepares an annual budget for approval by the Executive Council, the Dean, and the Governing Council.

2.4 Recording Secretary

i.   Takes minutes at all Governing Council meetings and maintains the official file of these records, including all pertinent materials that were handed out during each meeting.
ii.   Distributes completed minutes to the Governing Council for review and approval at the subsequent meeting.
iii.   Documents action items from Executive Council meetings.

Section 3—Executive Council

3.1 Membership
The Executive Council consists of the four officers of the Governing Council and the immediate past President of the Governing Council.

3.2 Duties and Responsibilities

i.   Recommends to the Executive Director and the Governing Council policies and procedures affecting the operations of OLLI.
ii.   Administers, with the Executive Director, OLLI policies and procedures.
iii.   The Executive Council, in conjunction with the Dean and the Executive Director, is empowered to take actions and to make relevant decisions relating to OLLI, subject to subsequent ratification by the Governing Council at its next regular meeting.
iv.   Establishes, with the Executive Director, the performance goals for OLLI and its staff, officers, and working groups.
v.   Organizes evaluations of OLLI performance goals for all staff, officers, and working groups.
vi.   Provides input to the Dean on the performance of the Executive Director. Evaluation and retention decisions follow established policy for University employees and reside with the Dean of the College.

3.3 Meetings

    i.   The Executive Council shall meet monthly and shall prepare the Governing Council meeting agendas.

    ii.   The President may call meetings of the Executive Council as needed and when petitioned to do so by any two of its members.

Section 4—Members at Large

The Governing Council includes two members at large. Each member at large has the following responsibilities:

4.1 Represents the general membership in the Governing Council.

4.2 Serves as a member of the Governance Working Group in accordance with Article VIII, Section 2.

4.3 Establishes specific goals for the term of office, with the approval of the Executive Council.

4.4 Reports on the status of the classroom art gallery, the annual OLLI art show, and coordinates activities with the University arts community.

4.5 Performs ad hoc roles as assigned by the President and the Executive Council.

Section 5—Elections

The general membership shall elect the President, Vice President, Treasurer, Recording Secretary, and two members at large. The working group leaders shall be appointed or approved by the President.

5.1 Election of officers shall be held every odd numbered year at the annual fall general membership meeting.

5.2 The Governance Working Group shall select a nominating committee of five members six months before the election specified in sub-section 4.1 and publicize the names of the nominating committee to all members.

5.3 All OLLI members will be encouraged to submit names of potential candidates to the nominating committee at any time prior to the fall general membership meeting.

5.4 The nominating committee will announce a slate of candidates prior to the fall general membership meeting. Nominations may also be made from the floor at the fall meeting.

5.5 In the event the nominating committee is unable to find a member who is qualified to hold a particular office, the committee shall immediately report this matter to the Governing Council, which may, by majority vote, waive the term limits specified in Section 5 of this article and permit an incumbent to run for another term in that office.

5.6 All members in good standing and present at the election meeting may vote. Proxy voting is not allowed.

Section 6—Terms of Office

The Governing Council officers and members at large are elected positions. Individuals elected to these positions will serve for two years and may be re-elected to one consecutive two-year term.

Each elected Council member shall hold office until his/her successor is elected or appointed. Elected members shall take office on the first day of the month following their election. Appointed members shall take office on the date specified by the President.

Section 7—Resignations

Any member of the Governing Council may resign at any time by giving written notice to the President of the Governing Council and the Executive Director. Any such resignation will be effective on the date specified on the written notification.

Section 8—Vacancies

All Governing Council vacancies may be filled with appointments by the Executive Council, in consultation with the Executive Director, to complete the term.

Section 9—Removal from Office

The Executive Council may remove officers or working group leaders for documented neglect of duty or malfeasance, such removal being subject to the approval of the ExecutiveDirectorandthe GoverningCouncil.

Article VIII—Working Groups Section 1—Core Working Groups

Members may volunteer to serve on a Core Working Group with the approval of the President or group leader. The group leader shall be elected by the working group or appointed by the

President. The leader or co-leader of each Core Working Group shall represent the group as a member of the Governing Council as specified in Article VII, Section 1, and shall oversee group activities and functions. Each group shall organize itself into subgroups, committees, task forces or other functional units, as it chooses, in order to fulfill its responsibilities. When there is overlap between working groups, the groups shall cooperate so as to fulfill their responsibilities.

1.1 Education Working Group—non-technology curriculum, special educational events, and satellite campuses

Responsibilities

i.   Establishes the non-technology curriculum, including class offerings, leaders, locations, dates, times, and catalog descriptions.
ii.   Evaluates the effectiveness of classes and class leaders using written class feedback from students and/or by peer review.
iii. Offers, in cooperation with the Technology Working Group, instructor training in classroom presentation techniques and technology.
iv.   Plans and implements intersession programs, guest lectures, and special presentations.

1.2   Technology Working Group —technology lab and instructional technology

Responsibilities

i.   Administers the technology lab in accordance with College and University computer use and security policies.
ii.   Works with the College Informational Technology Consultants to support OLLI I/T equipment and software.
iii.   Establishes and oversees curriculum for technology classes.
iv.   Recruits instructors and coaches for technology classes and evaluates their effectiveness.
v.   Makes recommendations regarding the purchase and/or donation of I/T hardware and software.
vi.   Offers, in cooperation with the Education Working Group, instructor training in classroom presentation techniques and technology.
vii.   Provides technical assistants to help operate audio-visual equipment when requested by an instructor.
viii.   Develops a n d maintains work-arounds so disruptions in the event of equipment failure. as to minimize class
ix.   Oversees the process of equipment repairs, replacements, and enhancements
x.   Tracks and recommends emerging academic technology trends.
xi.   Explores distance-learning in accordance with Osher Foundation standards.

1.3 Communications Working Group—publications, marketing and public relations and archives

Responsibilities

i.   Produces *The SUN*—the quarterly newsletter/course catalog—and other publications as required, including marketing brochures and special event flyers.
ii.   Engages in marketing and public relations activities including collaboration with other CSULB entities for mutual benefit.
iii.   In conjunction with the MSWG, coordinates participation in University and community events (e.g., health fairs).
iv.   Ensures posting of news and events to the OLLI website and social media links.
v.   Archives items of historical interest such as editions of *The SUN*, other publications, bylaws, policies and procedures, meeting minutes, and member surveys.Makes historical archives accessible to all members.

1.4 Member Services Working Group—membership, volunteers, social events, and fundraising

Responsibilities

i.   Assists in recruitment and retention of members.
ii.   Assists in recruiting volunteers to fill needs as identified by the Governing Council and working groups.

iii. Distributes The SUN and other membership recruitment materials as necessary to the greater Long Beach community.
iv. Organizes activities and events to welcome and orient new OLLI members.
v. Organizes general membership meetings.
vi. In conjunction with the CWG, coordinates participation in University and community events (e.g., health fairs, Age Friendly University). Organizes at least one volunteer recognition event per year.
vii. Organizes events such as socials, dedications, holiday celebrations, excursions, and memorials.

Section 2—Governance Working Group

2.1 Membership

i. The Governing Council Vice President shall chair this group.
ii. Other members shall include at least the immediate past President of the Governing Council, the two elected Members at Large, and an OLLI member who is not a member of the Governing Council.

2.2 Responsibilities
   i. Initiates the strategic planning process and development of annualand long-term goals and presents these to the Executive Council for discussion and approval by the Governing Council.
   ii. Oversees the nomination and election of Governing Council Officers. Oversees the mentoring and grooming of potential future leaders for the organization.
   iii. Makes recommendations to the Executive Council of persons to fill Governing Council vacancies.
   iv. Reviews the bylaws annually and recommends revisions to the Governing Council.
   v. Drafts and presents to the Governing Council for its approval revisions of existing policies and procedures and new policies and procedures that are deemed necessary.
   vi. Conducts an annual review of the strategic plan and recommends modifications as needed.

Section 3—Ad Hoc Working Groups

The OLLI Governing Council President, in conjunction with the Executive Director, shall determine and establish ad hoc working groups as needed. The group leader shall submit periodic reports to the Governing Council either in person or in writing. When attending Governing Council meetings, ad hoc group leaders shall be entitled to a voice in the proceedings but shall not have voting privileges.

Article IX—Meetings

Section 1—General Membership

There will be an annual fall meeting of the general membership covering a review of the state of OLLI, general activities, elections, and other business. Upon supplying sufficient

notice to the membership via postings and classroom announcements, the President may call other general membership meetings as needed to conduct the business of OLLI.

Section 2—Governing Council

The Governing Council shall meet at least ten (10) times per year. There must be a quorum of members to constitute a meeting for voting purposes. A quorum consists of a majority of the members of the governing council as defined in Article VII, Section 1.1, of these bylaws.

Governing Council meetings are open to all OLLI members. The agenda for each meeting should include an item allowing members to address the Council.

When deemed necessary or expedient by the President and Executive Director, a meeting for voting purposes may be conducted either via telephone or electronically via e-mail

Section 3—Working Groups

Working Groups shall meet as necessary to fulfill their responsibilities. Meetings should disseminateinformationfromtheGoverningCouncilanddevelopinputsfor theGoverning Council.

Article X—Amending Bylaws

Amendments to the bylaws shall be proposed by the Governance Working Group and submitted to the Executive Council and Governing Council. If approved by a by a simple majority vote of the Governing Council, they will be presented to the general membership and adopted by a two-thirds vote of the members present and voting at any general membership meeting.

Article XI—Parliamentary Authority

The rules contained in the current edition of Robert's Rules of Order shall govern this organization in all cases to which they are applicable and in which they are not inconsistent with these bylaws and any special rules of order the membership shall adopt.

Article XII—Dissolution Section 1—Distribution of Assets

In the event of dissolution of OLLI, the net assets shall be applied and distributed as follows:

1.1 All liabilities shall be paid or provision shall be made therefore.
1.2 No assets shall be distributed to any member of OLLI.
1.3 All remaining assets shall be transferred to the College.

Notes:

1. This Center was founded in 1996 as California State University at Long Beach,

   College of Health and Human Services, Senior University.Doors were opened on October 04,1996 for classes. In March 2004, we joined the Osher Lifelong Learning Institute and amended our name to Osher Lifelong Learning Institute— Senior University at CSULB. Then on June 10, 2006, we changed our name to Osher Lifelong Learning Institute at California State University Long Beach.

2. The change in the Center's name was formally approved by the Board of Trustees of the California State University on September 18, 2007.

Approved by Governing Council August 16, 2019

Strategic Plan

OLLI at CSULB
2019 to 2024 Strategic Plan

OLLI first offered classes in October 1996 as the Senior University at California State University Long Beach (CSULB). Then, as now, the goal was to provide an environment for older adults to fulfill the desire to never stop learning. Fifty students enrolled that first session. Withinoneyear,therewere450 members.

In 2006, in recognition of generous support provided by the Bernard Osher Foundation, Senior University became the Osher Lifelong Learning Institute (OLLI) in the College of Health and Human Services (CHHS) at CSULB. Because of demonstrated success, the Osher Foundation provided what is now a $2 million endowment to ensure permanent support for our program.

We offer four multi-week class sessions each year. Approximately 75% of our courses meet on the University campus. For the 2018/2019 academic year, we had over 120 volunteer instructors, offering an average of 85 classes per session. We ended the academic year with almost 2000 members, an all-time high.

Our Mission

OLLI at CSULB provides educational opportunities, encourages an active lifestyle, and promotes social opportunities for older adults. We celebrate the positive aspects of aging through a community that fosters personal growth, promotes individual empowerment, and nurtures human potential through lifelong learning.

Background

In 2014, OLLI at CSULB adopted a strategic plan that focused on achieving certain objectives. The objectives and subsequent results:

1. **Improve Member Communications**- The quarterly "SUN" newsletter continues as our primary method of communicating with members. This is augmented by digital communications (e.g. mass email communication supported by our new online registration system, the OLLI web site, Facebook, etc.) and prominent on-site hallway and electronic bulletin boards. We offer many events each year, including social gatherings, orientation meetings, membership meetings, and group travel to local places of intellectual interest.
2. Increase Classroom Space and Convenience- Additional venues were added since 2014. We have offered Saturday and evening classes, expanded our offerings at the Alpert Jewish Community Center, and begun holding classes at American Gold Star Manor in collaboration with a CHHS initiative. While we have adjusted the quarterly sessions to coincide with 2-month periods in order to limit parking costs, cost-effective, available parking remains a significant problem. We installed new

comfortable seating in the OLLI lobby area, added a covered outdoor seating area, and upgraded the chairs in the main campus classroom.

3. **Modernize our Technology**- We implemented on-line registration and have achieved a 70% participation rate with the new data management system. We have continued to keep the Computer Lab technology current and have upgraded the laptop and audio/visual system in the main classroom. While we have digitally archived some past issues of the "SUN," we have not been able to create a robust archival system for all "SUNs" or other important documentation.

4. **Increase University Collaboration**- We have established continuous working relationships with other departments of the CHHS and the Department of Design (College of the Arts) including providing our members to aid their research endeavors. Staff from the University Art Museum have taught OLLI classes. We have established a member-funded endowment for graduate student research awards in a field related to aging.

5. **Perform Targeted Fundraising**- We continued to obtain adequate donations to keep ourfinancial situation satisfactory. This has also enabled us to offer OLLI scholarships to our qualifying members while having enough funds for our operations, maintenance, and expansion.

2019 – 2024 GOALS AND OBJECTIVES

With the support of the Executive Director (ED) in collaboration with the College of Health & Human Services, after coordination with the Executive Committee (EC), the Governance Working Group (GWG), the Education Working Group (EWG), the Communications Working Group (CWG), and the Technology Working Group (TWG), the OLLI Governing Council (CG) approved the following strategic plan:

1. **Implement Effective Governance and Leadership Development**
   - Reconstitute the Advisory Committee. (EC)
   - Establish an OLLI Leadership Training Program in order that we develop a cadre of available candidates to fill required management and governing positions. This will include a succession plan for all Council positions in consultation with past OLLI leaders, employing mentoring as a way to encourage participation. (EWG,MSWG)
   - Increase the volunteer cadre in proportion to membership growth, including a similar increase in instructors. (ALL)
   - Conduct an annual review of this strategic plan and modify as needed. (GC, GWG)
   - Continue to refine the governance structure and working group responsibilities. (EC,GWG)
   - Revise bylaws as necessary to implement the strategic plan. (GC) o Begin the next Strategic Planning Effort in 2023. (GWG)
   - Establish a volunteer Archivist/Historian position. (EC)

2. **Optimize Growth**
   - Emphasize diversity as we grow to include members from minority communities in Long Beach and surrounding cities. (ALL)

- Create additional venues to accommodate both growth needs and diverse members' locations (e.g. churches, community centers, assisted living facilities). Use available tools to enhance classroom space at CSULB, as feasible. (EC)
- Offer classes tailored to various communities with assistance from CSULB students with applicable cultural and language skills. (EC) o Provide additional parking options by pursuing off-site parking with shuttle service (if necessary). Work with the Cashiers Office/Parking management to simplify on-line purchases of parking permits. (EC, ED, Office)
- Encourage public transportation use and carpooling as alternatives to parking on campus. (EC, Office)
- Add evening classes. (EWG)
- Establish a Marketing and Public Relations Committee (MPRC) within the Communications Working Group to create and implement marketing plans for outreach to enhance diversity of membership. (EC,CWG)
- Develop a social media presence. (CWG)
- Focus on membership diversity. (CWG)
- Create a culture of communicating information through email to the membership. (CWG, Office)
- Redesign the OLLI brochure to enhance outreach. (EC, CWG)
- Develop objective metrics for determining the success of off-campus locations to include member and instructor satisfaction, growth potential, and cost/member including logistics, paid staff time, and capital expenditures. (EC,EWG)

3. **Remain Member Driven for Curriculum and Events**
   - Continue to offer a variety of classes and special events. (EWG,TWG) o Offer the Otto Ross Salon every two years. (EC)
   - Evaluate and upgrade the technology lab by providing new equipment
   - as needed. (TWG)
   - Establish technology mentors for instructors. (EWG,TWG, Office) o Increase online registration and explore further enhancements to a user-friendly environment for registration/donations. (EC, Office)
   - Mine the data base for additional volunteers and instructors. (MSWG, EWG, and TWG)
   - Explore distance learning in accordance with Osher Foundation regulations. (EWG,TWG)
   - Expand social activities and travel opportunities for all OLLI members both on-campus and in the community-(MSWG)
     Plan for the 25th Anniversary celebration coming in 2021. (ALL)

4. **Sustain Financial Stability**
   - Establish a Finance Committee or Working Group. (EC)
   - Set a fundraising goal to help achieve a balanced budget. (EC)
   - Develop a planned giving program. (EC)
   - Review the fee structure. (EC)
   - Develop position descriptions for the Treasurer and the Comptroller.
   - Plan donor recognition events. (MSWG)

- Identify uses for endowment funds annually. (EC)

5. **Increase University and Community Involvement**
   - Participate in the Age-Friendly University activities and increase visibility with the office of the Provost. (EC,MSWG)
   - Participate in the Long Beach Age-Friendly City initiative. (EC,MSWG) o Collaborate with local cities for classes at senior centers and libraries. EWG)
   - Establish ongoing relationships with University alumni/emeriti groups and associations for mutual benefit. (EC, ED)
   - Establish a relationship with the Cole Conservatory in order to explore
   - additional locations for music and performance classes. (EC, ED) o Investigate and encourage volunteer opportunities within the University. (MSWG, ED)
   - Offer OLLI members opportunities to be guest speakers for University classes. (EC, ED, Office)
   - Establish a formal agreement or method for OLLI members to audit University classes. (ED, EC)
   - Encourage CSULB students/faculty who conduct research with OLLI members to present results to OLLI members. Enhance the relationship with the Design and CHHS Departments to easily facilitate use of their rooms by offering OLLI members as potential subjects for research projects and collaboration. (EC, ED)
   - Maintain a strong relationship with the LifeFit Center and PT @ the Beach. (EC, ED)
   - Present an OLLI/Fitzpatrick Family Graduate Student Research Award annually. (EC)