

OSHER LIFELONG LEARNING INSTITUTE at Yavapai College
Policies & Procedures
November, 2025 Version

MISSION & VISION:

Osher Lifelong Learning Institute (OLLI) is part of the Yavapai College Division of Lifelong Learning. OLLI programs and classes stimulate the mind, foster creativity, explore local communities, expand cultural appreciation and build lasting friendships. OLLI invites adult learners to enhance their knowledge, meet new people and relish the Yavapai College educational experience. *After college, after kids, after career, there's lifelong learning at OLLI.*

OLLI at Yavapai College offers individual locations for learning opportunities.

OPERATING POLICIES

The Osher Lifelong Learning Institute (OLLI) at Yavapai College serves Prescott, Prescott Valley, Sedona and Verde Valley, hereinafter referred to as OLLI and operates under Yavapai College's Division of Lifelong Learning and is subject to the general rules and regulations of Yavapai College. Office facilities are provided by Yavapai College. Classrooms, staff, and venues for special events are provided on a space-available basis.

The following policies and procedures have been approved by the OLLI Governing Council (GC). They are intended to be used in all activities regarding OLLI. Any deviations from these policies and procedures must be approved by the GC. To assure continuity and appropriate governance over the administration of OLLI, these documents should be reviewed every 2 years, at minimum and distributed to all members of the GC and Committee Chairs. Copies are available to the general membership upon request and on the OLLI web page.

ORGANIZATION

OLLI operates independently of Yavapai College insofar as curriculum and schedule are concerned but maintains communication and business contact through a college employee who serves as an Director and liaison between the two entities. The Director and supporting staff are employed by Yavapai College.

OPERATIONS

OLLI conducts five six-week sessions per year: Winter, Spring, Summer, Fall 1, and Fall 2. Workshops, Munch and Learn, Special Interest Groups, field trips, educational travel and social activities are also scheduled throughout the year. If the Yavapai College campus is closed due to weather conditions or other emergencies, OLLI will also cancel all planned events.

Local radio stations and the Yavapai College web page as well as “alertYC” report college closings. The OLLI office may remain open under these circumstances, but members should call first before traveling to the campus.

GOVERNING COUNCIL

The GC is the policy-making body of OLLI and operates in accordance with the Bylaws. The Council is responsible for business decisions and may delegate responsibility for action.

Council members are elected as specified in the Bylaws. GC members represent the OLLI general membership by actively participating in the governance of OLLI and by acting as a liaison between the membership and the OLLI Director. GC members’ responsibilities are defined in the OLLI Governing Council Member Responsibilities section (Appendix A).

Each year the GC reviews the previous year’s goals and progress toward meeting those goals. The GC sets goals for the next fiscal year. The GC elects the Chair, Vice Chair, and Communication Chair from among its members as soon as the new Council members have taken up their duties.

A minimum of 10 GC meetings per year are held and are open to all OLLI members. Attendance at meetings is either in person or via ZOOM.

Interim business may be transacted by mail, conference calls, or e-mail when necessary. GC member interaction using these alternate methods of communication will be held to the same level of authority. The same requirements for voting will be used as in a regular meeting. A report of the conference and/or ballot outcome will be made available to all Council members, and a written report of the action taken by mail, conference call, or e-mail will be provided.

The GC retains the responsibility and authority to call Special or Emergency Meetings of the GC membership to address issues which would cause an unreasonable and/or extreme delay in resolution of the issue. Special Meetings may be conducted through written notification of the membership, which includes a full explanation of the issue; a method for response or ballot and an appropriate response time.

Governing Council Member Responsibilities: See Appendix A

EXECUTIVE COMMITTEE

The EC provides leadership and guidance for OLLI governance (the GC and committees). The EC is made up of the GC Chair, the GC Vice Chair, the Communication Chair, and the OLLI Director. Specific committee responsibilities are described in the OLLI EC Charter, Roles, and Responsibilities section (Appendix B).

- **Issue Resolution Process:** In the event of major conflicts or issues arising, the parties involved should take the following steps for resolution. All resolution actions are confidential to the EC and interested parties:
 - Attempt to resolve the issue with respectful discussion.
 - If the issue is not resolved, submit the issue in writing to the responsible OLLI committee. The committee will respond after their next meeting scheduled. Witnesses may be asked for background information.
 - If it is still not resolved, submit the issue in writing to the OLLI GC. Complainants may also be asked to present the issue to the GC for their consideration and possible action. The GC will communicate the expected timeline for resolution. The GC decision is final.
 - If there is any apparent conflict of interest, the conflicted member(s) will recuse themselves from the resolution process. At any point in this process, the OLLI Director may be asked to assist in resolving the issue.
- **Personnel Activity:** The EC provides evaluation input for the Director if requested by Yavapai College.
- **Scholarship Subcommittee:** As a subcommittee of the Executive Committee, the Scholarship Committee awards full or partial scholarships for a Deluxe Membership, based on income levels. The committee includes the GC Chair, GC Vice Chair, and Communication Chair and the OLLI Director.

OLLI MEMBERSHIP

Membership requirements are set forth in the OLLI Bylaws. Applications may be submitted for membership at any time. A current membership roster will be maintained by the staff. For administrative purposes, membership terms coincide with the ending of each session.

OLLI PRIVACY POLICY

OLLI doesn't ask for personal information unless it is truly needed and doesn't share it with outside parties except to comply with the law or protect members' rights. Personal e-mail addresses are only used to communicate OLLI information or business with members. Personal information, such as a member's home address, telephone number, date of birth, and e-mail will not be distributed to other members without the member's expressed consent and may not be used for marketing purposes or as a distribution list for commercial purpose or private gain. Personal information is protected by internal OLLI security measures.

Election to the GC or as a committee chair assumes implied consent to provide email addresses of said people to interested OLLI members for use in OLLI business.

Personal information is stored in the OLLI database and in hard copy files. Electronic information stored in computers is protected by internal OLLI security measures.. Personal member information, other than first and last names, will not be listed on the OLLI website or in any other venue with public access without the expressed consent of the member. Examples include, but are not limited to course catalogs, social media (like Twitter, Facebook, and blogs), radio, television, and other print media.

FUNDING

Yavapai College acts as the OLLI fiscal agent, and all funds are maintained in Yavapai College accounts. OLLI operates within Yavapai College fiscal policies and complies with all Yavapai College accounting and purchasing rules. Funds are received and disbursed through the Director as directed by the Council.

OLLI is funded by membership fees, grants, endowments, and donations, while Yavapai College supplies essential resources. Members and supporters can make additional contributions which follow Yavapai College Foundation rules. Donations may be directed specifically to various OLLI funds maintained by the Foundation. Regular publication of such solicitations should be included in the catalog and other means. The membership fee schedule will be established by the GC. No person will commit funds or otherwise obligate OLLI or Yavapai College except as outlined in these operating policies.

Authorized members, i.e., GC members, committee chairs, and facilitators may use OLLI office facilities or the Yavapai College reproduction facility for duplicating materials. Staff approval is required before using outside reproduction facilities which require reimbursement. With sufficient advance notice, orders can be requested from the Yavapai College reproduction facility electronically or through the staff.

Any purchase of capital equipment must be pre-approved by the GC. Such items become the property of OLLI. OLLI will pay expenses that are directly related to OLLI functions and are approved by the Council or by the appropriate committee chair, if the expenses fall within their allotted budget. Any spending by committees that exceeds said budget must be approved by the GC. The Director will act as a purchasing liaison with Yavapai College. The Director will present the appropriate documentation for purchase and payment to Yavapai College. All matters not specifically defined by these policies will be resolved in accordance with the Bylaws and approval by the GC.

COMMITTEES

Committees are essential components of OLLI, and their members plan and execute the necessary programs and activities which complete OLLI's mission. Committees are responsible for meeting the strategic goals established by the GC. The GC has the ultimate oversight for the operation of all committees.

The GC will appoint a GC member as liaison to each committee to facilitate Council/committee communications. The liaison may become a full committee member or act solely as a liaison. Committees may nominate their chairs from among their members and recommend them to the GC for approval. Newly appointed committee chairs must be approved by the GC. A committee chair will not serve more than four (4) consecutive years, unless the limit is extended at the request of the committee and committee chair and with the approval of the GC.

Committee members are responsible for understanding OLLI policies and procedures as well as the committee's roles and responsibilities. Committees will formulate their annual objectives based on the OLLI strategic goals for the fiscal year. Objectives will be presented yearly to the GC for approval.

The GC chair is an ex-officio member of all committees except the Nominating Committee, and the Director is an ex-officio member of all committees. Committee meetings are established by the committee chair. Committee chairs will notify the GC EC of times and dates of meetings. Committee chairs may submit a report, attend GC meetings, or send a representative to report on their committee activities and progress towards meeting Council strategic goals on a regular basis.

Committee reports will be shared with the GC either verbally or in writing. Committee chairs may prepare and submit articles for the OLLI Announcements to staff. Committees have authority to disperse funds within their budget but will petition the GC for approval of expenditures and events beyond their budget.

All committee meetings are open to the OLLI membership.

The charter, roles, and responsibilities of each committee are described in that committee Charter, Roles, and Responsibilities section that is agreed to by the committee chair and the committee GC liaison. Committee chair responsibilities are defined in the OLLI Committee Chair Responsibilities section (Appendix C).

STANDING COMMITTEES

Standing committees consist of, but are not necessarily limited to, the following: Curriculum, Finance, Member Engagement, Marketing and Communication, Social, Technology, and Travel. Committee chairs may appoint individuals for specific functions within their committees. Location specific procedures will be developed by the location. Documents will be available on the OLLI Website. Committees will submit an annual budget to the Finance Committee upon request.

- **Curriculum**

- The Curriculum Committee develops classes for membership; encourages facilitator participation; trains, mentors, and evaluates facilitators; and in conjunction with staff, publishes the schedule of classes. The Curriculum Committee is composed of members with various experiences that correlate with the interests and needs of the committee.

- **Finance**

- The Finance Committee develops an annual budget with input from the GC, staff, and the OLLI committees. The procedures used will be in accordance with Yavapai College. The proposed budget is submitted to the GC for approval. The Finance Committee meets periodically throughout the year to review the budget and OLLI spending. Financial reports prepared by the Finance chair and Director are presented to the

GC each academic session. The reports will include a summary of all sources of revenue (including membership fees, foundation income, donations to scholarship and operating expense funds, trip fees, etc.), all categories of expense (including administrative costs, operating expenses, trip expenses, or any other disbursements of funds), and will identify financial trends and risks.

- **Marketing and Communication**

- The Marketing and Communication Committee helps Yavapai OLLI achieve its annual and long-term organizational objectives.

- **Member Engagement**

- The Member Engagement Committee encourages member participation in the many OLLI opportunities both within and beyond the classroom, such as becoming a volunteer or facilitator, attending social events, or joining a special interest group.

- **Social**

- The Social Committee plans and organizes all social functions of OLLI and the Annual Meeting.

- **Technology**

- The goal of the Tech Committee is to fill the gap with classes and mentoring.

- **Travel**

- OLLI at Yavapai College offers opportunities for domestic and international travel for OLLI members to expand learning and provide meaningful experiences while traveling with fellow members. A small committee of OLLI volunteers, the OLLI Director and office staff work with a travel provider to plan trips. Destinations are chosen by OLLI surveys and OLLI membership input.

AD HOC COMMITTEES

Ad Hoc committees may be formed as necessary to address specific tasks.

CLASS GUIDELINES

- Classes are the main purpose of OLLI.
- Members are encouraged to facilitate classes and suggest subject matter for classes to the Curriculum Committee.
- Facilitator training is provided along with guidelines and necessary materials.
- Facilitators should be members of OLLI. A non-member facilitator should have an OLLI co-facilitator or mentor who may be assigned by the Curriculum Committee.
- Facilitators should have taken at least one OLLI class.
- Facilitators should attend Facilitator Training to learn the latest information and techniques regarding class leadership.
- Facilitators should attend scheduled facilitator meetings to share experience.

- Biased material should only be used as subject matter, not for other purposes.
- Discussion and debate are welcome in classes, but personal attacks will not be tolerated.
- Except for supplemental material or supplies required for a particular class, facilitators will not solicit the sale for profit of products or services. Waivers of this stipulation may be approved by the Curriculum Committee.
- All facilitators and members should be aware of and sensitive to the special needs of class participants. Members may specifically request reasonable accommodations. If necessary, facilitators and members can contact staff for assistance in meeting technology, disability, or other requests.
- OLLI follows the guidelines of Yavapai College regarding copyright and fair use for specific content regarding educational intellectual property.
- Class Proposals:
 - Facilitators must submit a proposal form, which should reach the OLLI Office based on published guidelines.
 - First-time facilitators and experienced facilitators proposing a different style or topic should present their proposals in person to the Curriculum Committee.
 - Based on the Class proposal, the Curriculum Committee may:
 - Approve the class as proposed,
 - Approve the class with minor changes,
 - Assign a mentor and/or co-facilitator,
 - Request changes, requiring resubmission of the proposal.
 - Reject the proposal based on Curriculum Committee guidelines.
 - Classes addressing controversial issues need to ensure that all sides of the issue are presented.
 - All participants should be sensitive to stereotypes and biases to avoid material that could be considered libelous, defamatory, false, misleading, abusive, threatening, harassing, discriminatory, illegal, or degrading of others based on gender, race, disability, class, ethnicity, national origin, religion, sexual orientation, or other classification.

OLLI members must agree to uphold the Class Guidelines. Any problems relating to class content or facilitators should be immediately referred to the Curriculum Committee Chairperson for action. The Curriculum Committee reserves the right to terminate a class for non-compliance with these guidelines.

Guests

OLLI welcomes the opportunity to showcase OLLI and entice others to join. With the permission of the facilitator, a non-OLLI member may attend one class as a guest of an enrolled OLLI member. Guests must sign the attendance sheet and abide by the OLLI code of behavior.

Vouchers

Vouchers will be given to facilitators of classes as a thank you from OLLI. These vouchers may be used for either a partial payment towards membership or for one free class.

Special Interest Groups (SIGs)

Special Interest Groups (SIGs) are groups of OLLI members who share a common interest and would like to meet outside the standard OLLI classroom environment. Besides defining its own purpose and format, each SIG designates a coordinator who serves as the contact person.

All SIG participants should be OLLI members. Every 6 months the coordinator verifies membership status with staff. At the discretion of the coordinator, guests may attend.

All SIG proposals are processed through the SIG Chairperson and are subject to the Guidelines for Starting and Maintaining a SIG.

Preferential Enrollment and Prerequisite Classes

Preferential Enrollment: Applicants for an OLLI class deemed the sequel to a class offered the previous session will receive preference for enrollment. Prerequisite Class: Both the facilitator and Director have the discretion to waive any prerequisites for a class.

OLLI Code of Behavior

Many OLLI activities provide forums for lively and even passionate exchange of views. This is good as long as we follow principles of common courtesy. Opposing viewpoints should be respected and the dignity of others maintained at all times and in all locations. This includes religious, political, ethical, and social beliefs. Personal attacks are unacceptable. OLLI members, instructors, staff, or guests who do not adhere to these principles will be asked to leave the premises.

FEE STRUCTURE

Membership Fees

All members may participate in classes, social activities and other OLLI organized programs. The current fee structure, based on membership level, is in the session catalog.

Additional Expenses

If a class is held at a facility that incurs a cost, that cost will be shared equally among the participants. The purchase of supplemental material or supplies necessary for a particular class may be required. Social activities are free, unless a fee is required to cover the cost of refreshments, entertainment, or the venue.

Scholarships

OLLI bases and adjusts its scholarship awards for a Deluxe Membership on an adjusted gross income up to twice the federal poverty guidelines. Partial scholarships may be

awarded. In addition to the need of the member, the scholarships awarded will also be dependent upon availability of funds. All decisions of the Scholarship Committee are final.

Refunds

Membership Fees are not eligible for refunds or extensions unless someone has not used their membership due to unforeseen personal issues. Class fees may be refunded for other reasons (if OLLI cancels the class, or if a member does not get into a class due to over subscription) prior to the end of the first week of class.

APPENDIX A GOVERNING COUNCIL MEMBER RESPONSIBILITIES

Summary

Represent the OLLI general membership by actively participating in the governance of OLLI and acting as a liaison between the membership, GC and OLLI Administration.

Responsibilities

- Serve as a GC Member for the elected term (2 years)
- Attend annual membership meetings.
- Attend all council meetings with a minimum of 10 GC meetings per year.
Attendance at meetings is either in person or via ZOOM. In unable to attend, provide notification to the Communication Chair prior to the meeting. Updates should be provided on any assigned agenda items.
- Understand OLLI Bylaws and Policies and Procedures and participate in policy decisions as necessary
- Represent the membership at Council meetings and bring any requested items and actions to the Council
- Engage in OLLI business decisions
- Approve the budget and participate in financial decisions as presented by the Finance Committee
- Attend annual Strategic Planning Meeting to develop and establish goals
- Serve as a full member and act as liaison to at least one committee or participate in at least one task force
- Attend committee meetings and provide two-way communication between GC and committee members
- Review Committee Charter and Committee specific goals with Committee Chair on an annual basis

APPENDIX B

EXECUTIVE COMMITTEE CHARTER, ROLE, AND RESPONSIBILITIES

Charter

Provide leadership and guidance for OLLI governance (GC and committees).

Roles

- The Executive Committee(EC) is comprised of the following roles:
 - GC Chair
 - GC Vice Chair
 - GC Communication Chair
 - OLLI Director

Responsibilities

- **GC Meeting Agenda:** Prepare the monthly GC meeting agenda
- **Goals:** Review strategic and short-term goals and assign committee-specific goals following the annual goal planning meeting; perform periodic review of progress towards goals.
- **Issue Resolution Process:** Act as the group to resolve any conflicts or issues arising from OLLI activities.
- **Authority:**The EC has the authority to make decisions within the scope of the already approved budget, strategic plan, and mission of OLLI, providing the decisions do not fall outside the established policies and procedures. Decisions will be presented and reviewed at the next GC meeting.

OLLI Programs:

- Provide conduit for input for new initiatives, programs, or changes to OLLI offerings Generate and plan new initiatives, programs, and changes for GC approval.
- Assure implementation and oversight of GC-approved initiatives, programs, and changes and report results to GC
- Provide orientation to new members of the GC; ensure that new GC members are aware of GC member responsibilities.
- Ensure that OLLI membership is aware of open chair positions and provide leadership to ensure that open committee chair positions are filled in a reasonable timeframe. Ensure that key (time-sensitive) deliverables of the committee are assigned/completed as required
- Actively engage in the process of identifying and recruiting successors to key Council leadership positions (Chair, Vice Chair, Communication Chair)
- Manage the scholarship process in accordance with the OLLI Policies and Procedures
- Provide support and leadership to ensure effective operations and performance of OLLI Administrative Staff.

APPENDIX C

Committee Chair Responsibilities

Summary

The committee chair is responsible for all aspects of the committee, including chairing committee meetings; planning, organizing, and directing the work of the committee; and communicating with the GC regarding the goals, work, and progress of the committee.

Responsibilities

- Organize and provide leadership to the committee to perform its responsibilities
- Chair committee meetings on a regular basis
- Submit periodic reports on committee activities as appropriate to GC
- Annually review with the GC or its committee liaison the yearly goals of the committee based on OLLI yearly strategic goals
- Coordinate with GC and Finance Committee to establish yearly committee budget.
- Manage all expenditures within the approved annual budget

Appendix D

Committee Charters and Responsibilities

Curriculum Committee

Charter

The Curriculum Committee oversees learning opportunities for the membership; encourages facilitator participation; trains, mentors, and debriefs facilitators.

Responsibilities

- Plan and review session offerings to ensure good balance and adequate coverage
- Recruit facilitators
- Screen new facilitators
- Support facilitators
- Review proposed new classes
- Review class evaluations to assess facilitator performance
- Take corrective action when issues with individual facilitators are identified

Finance Committee

Charter

The Finance Committee is responsible for all the finances associated with OLLI including budgeting, monitoring, reporting and assuring fiscal responsibility.

Responsibilities

- Develop an annual budget with input from the GC, Director, and OLLI committees
- Submit the proposed annual budget for GC review and approval
- Periodically review OLLI income and spending and prepare financial reports for presentation to the GC
- Provide guidance to the GC and Director on discretionary expenditures, revenue, membership rate structure, practices necessary to maintain the integrity of financial transactions, and the solvency of the Prescott OLLI organization
- Create and maintain complete and accurate documentation on all financial activity

Member Engagement

Charter

The Member Engagement Committee promotes deeper engagement of OLLI members within the OLLI community by reaching out and connecting both new and existing members to the wide range of OLLI activities and volunteer opportunities inside and outside of the classroom.

Responsibilities

- Welcome and engage new and existing members through various activities.
- Recruit, train and coordinate two OLLI volunteer roles:

- New Member Mentors – responsible for reaching out to welcome new members, answer questions and connect them with the multiple opportunities to engage within OLLI
- Classroom Ambassadors – responsible for providing a friendly welcome to classrooms, making announcements to keep members informed, and promoting volunteer and other opportunities for engagement within OLLI.
- Maintain regular connection with OLLI committee chairs to track volunteer needs and other opportunities for member engagement,
- Promote volunteerism to meet OLLI needs
- If needed, serve as liaison to connect potential volunteers with committee chair that matches person's interests.
- Work with committee chairs to recognize and honor volunteers.

Personnel Subcommittee

Charter

The Personnel Subcommittee (a subcommittee of the Executive Committee) coordinates with Yavapai College regarding employees (administrative staff) assigned to OLLI.

Responsibilities

- Provide, if requested, Director and staff evaluation input to Dean of Lifelong Learning.
- Work with Yavapai College to provide feedback (Include 360 eval?)
- Propose job descriptions or requirements for administrative staff positions, if requested or required
- Address complaints and/or personnel issues related to the OLLI administrative staff as necessary

Marketing and Communication

Charter

The Marketing and Communications Committee helps Prescott OLLI achieve the annual and long-term organizational objectives relating to the growth, stability, awareness, and image of OLLI with members and in the community.

Responsibilities

- Develop the public 'message'/theme to be used consistently throughout materials; may be reviewed annually with any new OLLI goals and objectives. Identify realistic, financially viable promotional opportunities.
- Develop and run marketing campaigns
- Support communications and messaging to both the membership and the community at large
- Develop and propose an annual budget
- Develop and submit a marketing and communications plan to the GC for review and approval.
- Marketing activity examples: Public speaking, radio spots, billboards, newspaper articles, social media, public relations, exhibit and function staffing, website

messaging, development and distribution of collateral materials. The committee meets as needed and may recruit additional expertise to assist with the marketing and/or communication plan execution.

Social Committee

Charter

The Social Committee defines, plans and organizes all social functions of OLLI and the Annual Meeting and conducts membership activities.

Responsibilities

- Choose facilities in which social events will occur.
- Make reservations at facilities which have been selected for social events, including contracts (if applicable) and deposits.
- Select menu for social events which include a meal.
- Select and/or arrange for refreshments for social events at which refreshments are desired in conjunction with the GC, establish the program for social events.
Provide entertainment for social events when required

Technology Committee

Charter

OLLI members are surrounded by and use technology in their daily lives. But sometimes there is a gap between what they know and what they want to accomplish. The goal of the Tech Committee is to fill that gap with classes and mentoring.

Responsibilities

Appendix E

Site Operations Specifics:

Prescott/Prescott Valley Advisory Council:

- This group will be assembled, if necessary, to provide any specialized guidance to the location given their unique geographic needs. Guidelines for this group will be developed as necessary.

Sedona/Verde Valley Advisory Council:

- This group has been assembled to provide any specialized guidance to the location given their unique geographic needs. Guidelines for this group are in development

APPENDIX F:

OLLI at Yavapai College Significant Enrichment Programs

OLLI at Yavapai College International Travel Program

Policies and Procedures

- OLLI at Yavapai College offers opportunities for international travel to OLLI members to expand learning and provide meaningful experiences while traveling with fellow members in trips designed to meet the needs of mature adults. OLLI works with contracted travel companies that focus on educational experiences with the ability to customize trips. OLLI selects locations based on surveys, member interest, and cost. Small groups may be formed to assist in planning the request for a location, and to review the proposal(s) to determine if the plan meets our needs.
- Once a trip is planned, OLLI schedules an initial informational meeting which is led by the contracted travel company. The company will have sufficient details and the ability to answer questions for the potential participants. OLLI staff and volunteers will determine the timing of the informational meeting, the need for additional meetings, and the timing for the opening of registration for the trip. The OLLI Director will accompany the trip, or have a designated OLLI volunteer, who will travel for free, and have responsibility for acting as a liaison between the travelers and the travel company, and problem solve as needed during the trip. The OLLI Director will plan a final informational session for travelers and the travel company several weeks prior to departure to answer last minute questions.

Procedures:

- Once a location has been selected and the travel proposal accepted, staff will:
 - Confirm the day and time for an informational session (ZOOM) – led by the Travel Company staff
 - Create a jotform to sign up interested members for the informational session
 - Utilize the standing zoom link (set to record)
 - Create marketing materials – flyers, ads for announcements
 - Advertise internally through weekly announcements, ambassadors, and flyers
 - If demand for a particular trip isn't meeting expectations, advertise externally - facebook, YC boards, PSAs
 - Send reminders to the interested members
 - Attend and welcome OLLI members to the session, and introduce the staff from the travel company
 - Track enrollment, keep OLLI leadership and volunteers involved in the trip planning informed

- Coordinate with appropriate OLLI committees such as Curriculum and Social to plan programming and classes that relate to the trip themes.
- Advertise the trip themed classes and activities to the enrolled participants.
- Plan a gathering for participants to meet each other and ask questions of the travel staff (via ZOOM.)
- Gather feedback after the trip, create lessons learned for future trips.