



EDMONDS COLLEGE

CREATIVE RETIREMENT
INSTITUTE (CRI)

BACKGROUND INFO FOR CRI VOLUNTEERS

Welcome to CRI

Thank you for being a CRI community partner! This shows that you not only love to enjoy the benefits of CRI, but also that you are interested in the health and well-being of CRI. Our stated mission is to provide quality, affordable, educational opportunities for adults in a supportive environment. Our Board and Committee members work hard to be sure we do that.

Please help by contributing your ideas, time, talents, and your social support in our classrooms. One very important way to contribute, and to enhance your CRI experience, is by joining a CRI committee. Thanks for being an active part of this great organization. We hope this background information will give you a starting point for finding your place in it.

DEFINITIONS AND PURPOSE

The CRI Program. The Creative Retirement Institute is an Edmonds College (EC) lifelong learning program (hereafter referred to as “CRI” or “the Program”) founded and operated by community volunteers to “*offer the excitement of ideas to intellectually curious people in an environment that provides companionship and encourages friendships.*”¹ This led to the current CRI mission “*to provide affordable, quality lifelong learning opportunities to adults in a supportive environment.*”² The program also supports EC’s community service and adult education obligations under RCW 28B.50.020³.

¹ [CRI marks 20 years of loving to learn By John Nadeau](#)

² [From CRI Mission statement on the About page of CRI's website.](#)

³ RCW = Revised Code of Washington. In accordance with RCW 28B.50.020, Edmonds College offers “community services of an educational, cultural, and recreational nature; and adult education.”

The CRI Community Partners. The CRI Community Partners (hereafter referred to as the CCP) is an informal organization of volunteers dedicated to the vision of the original CRI founders (as defined above) and who perform essential services (e.g. planning, curriculum development, budgeting, marketing, outreach, and classroom support) that make the Program possible. Specific objectives of the CCP include (a) operating the Program in partnership with Edmonds College consistent with CRI's founding mission and EC rules, (b) ensuring that the CCP's volunteer staff is continually refreshed, (c) representing its volunteers in policy discussions affecting the Program, and (d) being a trusted partner with EC in the evolution and administration of the Program. The CCP operates the Program through various self-perpetuating committees and Board of Directors selected from the corps of volunteers.

Relationship between EC and CCP. The college has ultimate responsibility for the CRI program, and thus must maintain oversight over CRI Community Partners activities that may affect the reputation of the program or the college. The CCP operates the Program under delegated authority from the college, working collaboratively with the CRI Program Manager⁴. A Memorandum Of Understanding outlines the responsibilities and authority of each party.

CRI COMMITTEE ROLES AND RESPONSIBILITIES

CCP Board of Directors (usually referred to as "the CRI Board")

The CRI Board is composed of nine elected members plus the following ex-officio members: the Immediate past Board Chair, the Chair (or one Co-Chair) of each standing committee, and the CRI Program Manager. **The officers of the CCP** include a Chair, Vice Chair, and Secretary, elected from and by the voting members of the CRI Board.

Responsibilities:

- a. Representing the CCP volunteers in policy discussions with EC leadership and staff.
- b. Providing advice to EC leadership on policies and procedures relating to lifelong learning, particularly as it applies to seniors.
- c. Providing oversight and decision authority for jointly agreed upon program areas, including curriculum development and expanding our base of students, class support, community building, and budget co-management.

⁴ The CRI Program Manager is an employee of EC dedicated to day-to-day administration of the Program.

- d. Ensuring that student feedback is solicited and that the Program is aligned with evolving student needs.
- e. Adopting the policies and procedures, including the CCP Bylaws and Standing Rules, joint program oversight guidelines, and mutual understandings with EC.

Executive Committee. The Executive Committee of the Board is composed of the Board officers plus the Chair of the Finance Committee. The Executive Committee sets the agenda for Board meetings and acts on behalf of the Board between meetings

CRI Standing Committees

Audio/Visual (A/V)

Role: To provide technical audio/visual support for instructors.

Responsibilities:

- All committee volunteers new to the A/V role complete relevant training for online or in person classes prior to the beginning of the quarter.
- Also prior to the beginning of each quarter, committee members select classes they can support (online and/or in person classes). Volunteers will not be charged for classes they choose to support.
- Attend all assigned sessions of the class.
- Contact the instructor at least two weeks before the class begins. Introduce yourself and make the arrangements necessary to prepare for the class. This may entail a meeting with the instructor prior to the beginning of the first session to test equipment, answer questions regarding online classes, and/or schedule “dry runs”.
- Arrive at the online session or assigned classroom at least 30 minutes before class to assist the instructor with window configuration and screen sharing, and (for in-person classes) set up the needed equipment.
- Carefully pack and return all equipment to its correct storage location after class.
- Make notes of any improvements or additions to the instructions that would be helpful for use of the equipment and send them to the committee chair.
- Committee members track and submit their volunteer hours to the Program Manager monthly.

Classroom Support

Role: Arrange for class assistant (CA) volunteers for all in-person classes.

Responsibilities:

- Recruit class assistants from registered students for each in-person class.
- Prepare "class packets" (including CA's checklist, instructor bio, door sign, evaluation forms, and other information if required by the college or CRI office).
- In coordination with the CRI office, email class confirmations to each instructor 1-2 weeks before class starts. (Email includes class dates/times/location, name and contact information of the AV tech, the name of the CA assigned, and current class enrollment.)
- Provide training and mentoring for new CAs.
- Committee members track and submit their volunteer hours to the CRI Program Manager monthly.

Class Assistant (CA)

Role: Provide classroom support (detailed duties will be listed in the CA checklist provided by the classroom support volunteer prior to the class).

Responsibilities:

- Arrive 30 min before class starts.
- Welcome the instructor and students.
- Introduce the instructor to the class.
- Remind all participants to display their parking permits at each class.
- Announce any other important information as needed.

Curriculum

Role: To schedule college-level academic classes open to all regardless of previous educational background. To select instructors who will present a diverse slate of high quality courses each term.

Responsibilities:

- Determine what classes will be offered by reviewing suggestions, recruiting instructors and reviewing all proposals submitted.
- Contact instructors to secure completed course adoption forms.

- Prepare a schedule after final course approvals and confirm the dates and times with all instructors.
- Edit the course adoption forms and proof copies of all assembled material for the brochure/schedule.
- Coordinate with the Program Manager and Finance Chair to recommend appropriate action whenever enrollments indicate that a course cancellation or repetition may be advisable.
- Work with instructors and/or Marketing Committee to develop and implement strategies to increase course enrollments.
- Review all course evaluations, share results with instructors, and use evaluations to help determine future classes and resolve outstanding issues.
- Gather and assess current and changing interests of class participants to build the curriculum.
- Committee members track and submit their volunteer hours to the Program Manager monthly.

Finance

Role: To ensure the financial health of CRI.

Responsibilities:

- Prepare CRI Annual Budgets (Operating, Friends of CRI & DJ) by working with the various committees and the program staff to determine needs and expected costs, and then developing a plan to generate sufficient revenue from charges and fees.
- Track financial performance versus budget, by monitoring expenses and revenue on a monthly basis, in order to make timely recommendations for changes to the CRI Board as required.
- Evaluate proposals for changes in charges and fees and make recommendations to the CRI Board.
- Respond to requests from the Executive Committee or CRI Board concerning financial matters and policies.
- Evaluate and approve/deny non-budgeted financial requests.
- Committee members track and submit their volunteer hours to the Program Manager monthly.

Marketing

Role: Promote and market CRI to meet program goals for number of students and enrollments in quarterly classes.

Responsibilities:

- Create a marketing plan which identifies target audiences and how the annual Production Schedule will be supported.
- Develop advertising budget and approve marketing expenses requested by other committees.
- Create and place articles and ads. Work with the CRI Program Manager on the process, approval, and use of College resources.
- Identify and evaluate partnerships with other community organizations with shared goals.
- Develop relationships with media resources or organizations where collaboration serves mutual interests.
- Assure schedules/brochures and notices are distributed each quarter to appropriate locations.
- Publicize CRI classes on social media such as Facebook.
- Committee members track and submit their volunteer hours to the Program Manager monthly.

Outreach

Role: To plan and oversee CRI social and informational events for the purpose of communicating CRI mission and expanding our base of students and volunteers.

Responsibilities:

- Coordinate and manage Outreach events as detailed in the annual Production Schedule: up to three Meet and Greet (M&Gs) annually, and at least two Dorothy Jennings' Speakers Series (DJSS) events.
- Coordinate with the CRI Program Manager and Marketing Committee to secure program materials, speakers, and volunteer assistance.
- Coordinate as necessary with the CRI Program Manager on venue/location of events and purchase of event supplies (refreshments, etc.) as approved during the budgeting process.
- Work with the Marketing Committee on event promotion, e.g. writing press releases, media contacts, etc.

- Design events and activities (e.g., participant exercises), presentations, recognition activities, etc.
- Set-up and clean-up for events with help from the CRI board.
- Greet members and guests at events, check off names, and distribute name tags. Mix with attendees.
- Document attendee names and emails at events for follow up and data tracking purposes.
- Respond to community requests for sharing information about CRI - e.g. senior and volunteer fairs, farmers' markets, etc.
- Committee members track and submit their volunteer hours to the Program Manager monthly.

Volunteers

Role: To recruit and place candidates in various CCP volunteer positions. Develop and implement strategies to recognize and retain volunteers.

Responsibilities: The Volunteer Committee members:

- Contribute to development of an annual recruitment plan to identify priority volunteer needs (by committee).
- Solicit volunteers for specific roles based on their experience and interests.
- Develop role descriptions that define volunteer jobs and time requirements for committee work.
- Prepare recruitment materials, including capsule role descriptions.
- Recruit potential volunteers at CRI classes and events and other public forums.
- The *Nominations Officer* anticipates Board vacancies and develops an annual slate of candidates for Board and Officer elections. Makes recommendations for specific positions in coordination with the Executive Committee.
- Develop strategies and tools for volunteer recognition (name badges, anniversary events, promotion opportunities, etc.).
- Maintain volunteer rosters and skill inventories, and coordinate with the Marketing Committee for public recognition of our volunteers.
- Committee members track and submit their volunteer hours to the Program Manager monthly.