ROLES & RESPONSIBILITIES

Worcester Institute for Senior Education

at Assumption University

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I. INTRODUCTION

1. This document shall clarify the positions held by both volunteers and employees who have a role in the WISE leadership to:
    a. Remove ambiguity in their roles and responsibilities
    b. Define clear decision-making paths
    c. Aid in streamlining operational processes
    d. Better inform the membership so that potential leadership candidates volunteer and/or are nominated
    e. Set clear expectations for the salaried positions within WISE leadership
    f. Ease the hiring process for future personnel, and the recruitment of volunteers
2. The Roles & Responsibilities outlined herein are in accordance with the WISE Organization as defined in the Bylaws approved on 5/30/2024
3. This document shall be updated as needed based on organizational needs or as information technology advances
4. The rollout of these Roles & Responsibilities will include the individuals listed below. The definitions herein shall be upheld, and the message conveyed in a clear, consistent, and unified manner by:
    a. The Director and the Program Assistant
    b. The At-Large Members of the WISE Council
    c. Standing Committee Members
    d. WISE Members, as needed based on their current activities

II. GENERAL RESPONSIBILITIES

Regardless of their specific role within the WISE organization, all paid staff and volunteers are expected to:

1. Foster a culture of teamwork, respect, acknowledgement, inclusivity, transparency, and participation.
2. Be positive spokespersons of WISE and communicate the spirit of the WISE message to members and non-members alike.

III. THE WISE COUNCIL

1. The WISE Council is formed as stated in the WISE Bylaws. It shall consist of three At-Large volunteer members, together with one representative of each Standing Committee, and the Director.
    a. The At-Large members are responsible for any non-committee related work, including, but not limited to:
        i. The Council's monthly meeting agenda
        ii. Encouraging collaboration and coordination across committees
        iii. Organizational strategic direction
        iv. Personnel matters
        v. Advising the Director

b. The At-Large members share their responsibilities equally and work as a team so that no one role demands more time and effort than can reasonably be expected on a single volunteer

2. The WISE Council shall meet monthly, with additional meetings as needed. These meetings shall include the At-Large members, one representative from each Standing Committee, the Director and Program Assistant.

IV. STANDING COMMITTEES

1. Standing Committees are formed by volunteer WISE members as stated in the Bylaws.
2. Each Standing Committee shall identify a convenor to coordinate the committee meetings and represent that committee on the WISE Council. The convener may be in place for a set time (e.g. a year or quarter) or may rotate based on the needs of that committee.
3. Committee meetings shall have meeting minutes recorded and distributed to the Committee members, the Director and the Program Assistant in a timely fashion.
4. Each Standing Committee has a defined scope of work as follows:
    a. The **Curriculum Committee** is responsible for:
        i. Identifying and selecting course topics
        ii. Identifying and selecting instructors to deliver programs
        iii. Preparing course schedules
        iv. Selecting course delivery options, in coordination with Instructors
        v. Publishing the course catalog in partnership with the WISE office
        vi. Educating instructors on the effective delivery of WISE courses
        vii. Evaluating courses and Instructors
    b. The **Development Committee** is responsible for:
        i. Setting annual fundraising goals
        ii. Fundraising throughout the year, including the Annual Fund, special campaigns or other designated appeals
        iii. Preparation and execution of grant proposals
        iv. Planning and executing events for the specific purpose of fundraising
    c. The **Events Committee** is responsible for:
        i. Developing an engaging program of Special Events for WISE members
        ii. Managing the budget for Special Events
        iii. Securing event locations and managing logistics
        iv. Coordinating event volunteers
        v. Collecting feedback from event attendees
    d. The **Finance Committee** is responsible for:
        i. Preparing regular financial statements on behalf of WISE
        ii. Monitoring revenue and expenses against the budget
        iii. Recommending the annual budget to the WISE Council in conjunction with the Standing Committees
        iv. Advising the WISE Council on financial matters that may arise

e. The **Membership Committee** is responsible for:
        i. Recruiting new members and retaining current members (both individual and organizational memberships)
        ii. Marketing WISE as a total package (courses, clubs, SIGS, events, and volunteer opportunities)
    f. The **Technology Committee** is responsible for:
        i. Meeting the technology requirements of 21st century learning in a retirement organization
        ii. Defining technology for both in-person and virtual classes and meetings
        iii. Training instructors, hosts and class assistants in the technologies required to administer classes
        iv. Advising the WISE Council and Director as needed on non-classroom technology, such as membership applications and software

V. WISE OFFICE STAFF

1. The Director and Program Assistant are paid staff, employed by Assumption University, as stated in the Bylaws.
2. The **Director's** job description is reviewed each year and updated as needed based on changing organizational and technology requirements. The Director's responsibilities include, but are not limited to:
    a. Representing WISE within the Assumption University organization and working with the University President and other staff to fulfill the WISE mission.
    b. Ensuring that the WISE organization complies with the policies of Assumption University.
    c. Ensuring that the WISE organization functions within the scope of its Bylaws and Policies and fulfills its strategic imperatives.
    d. Preparing the annual budget in collaboration with the Finance Committee and managing all operational expenses in accordance with the planned budget
    e. Collaborating with the WISE Council and Standing Committees to help fulfill their scope of work, attending their meetings, and providing input.
    f. Ensuring that WISE is a transparent organization to its members, and that all relevant information and data is available on the WISE website.
    g. Serving as the highly visible point person for communication regarding WISE via the website, emails, social media, presentations and community outreach.
3. The **Program Assistant's** job description is reviewed each year and updated as needed based on changing organizational and technology requirements. The Program Assistant's responsibilities include, but are not limited to:
    a. Providing support to the Director in discharging her/his duties.
    b. Supporting the members of the WISE Council, Standing Committees, Instructors, and all other WISE organizational roles included herein.

c. Coordinating and maintaining aspects of the WISE website in collaboration with the Director.

d. Preparing all WISE Course Catalogs and related materials, both printed and electronic.

e. Maintaining and updating all WISE records and organizational data to ensure continuity and institutional memory, in collaboration with the Director and in accordance with WISE and Assumption University's policies on records retention.

f. Managing and maintaining financial information in support of membership transactions and operational expenses

VI. OTHER ORGANIZATIONAL ROLES

Below are additional roles, both paid and voluntary, that are part of WISE:

1. **Instructors:** Responsible for proposing prospective courses and the delivery of course material to class participants

2. **SIG Coordinator:** Responsible for proposing Special Interest Groups (SIGS) and the delivery of related material to session participants.

3. **Class Assistants:** Responsible for assisting instructors and class participants in the live classroom, by taking attendance, sharing WISE news, and assisting with in-room technology.

4. **Zoom Hosts:** Responsible for assisting instructors and class participants in the remote classroom, by initiating and hosting the virtual session, sharing WISE news, and assisting with Zoom technology.

5. **Club Leaders:** Responsible for coordinating all meetings of a WISE club (e.g., Movie Club, Fiction and Non-Fiction Book Clubs) and its associated logistics.

6. **Student Workers:** As needed, Assumption University work-study students may be recruited, hired, trained, and managed by the Director for administrative support. These students are responsible for:

   a. Performing tasks as outlined in their posted job description and/or as determined by the Director

   b. Submitting accurate employment contracts and timesheets to Director

   c. Communicating with Assumption University work-study administrators per the current work-study policies

VII. FINANCIAL RESPONSIBILTY MATRIX

The management of the WISE annual budget and expenses shall be based on the following:

Description	Prepared By	Collaborator(s)	Final Approval By
WISE operational annual budget	Program Assistant and Director	Director and Finance Committee	WISE Council
Standing Committees' annual budgets	Standing Committee designee(s)	Director and Finance Committee	WISE Council
WISE operational expenses	Program Assistant and Director		Director
Standing Committees' expenses	Standing Committee designee(s)		Director

VIII. WISE ORGANIZATIONAL STRUCTURE
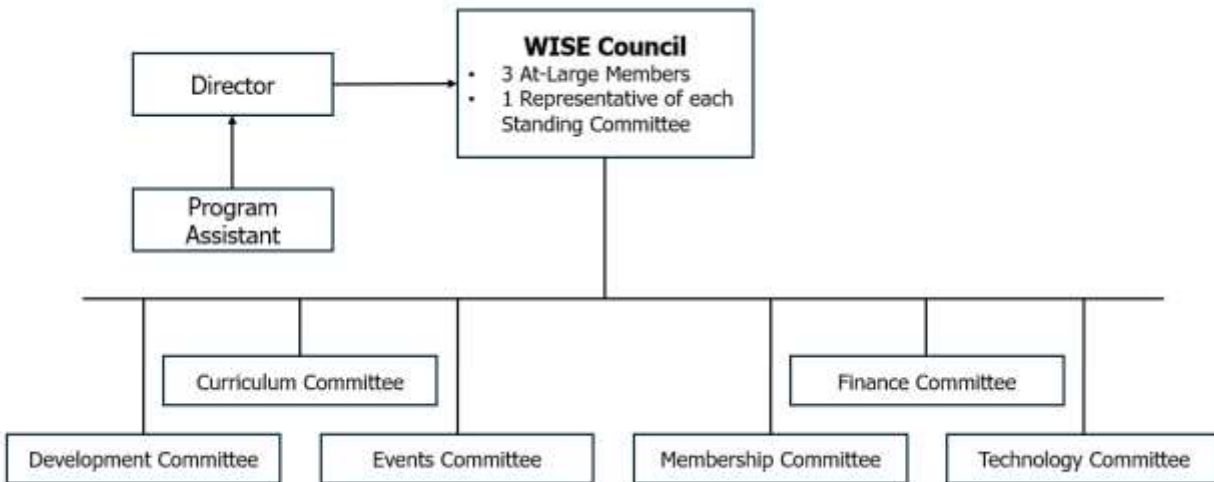
Roles & Responsibilities Revision History

Effective Date	WISE Council Approval
November 2024	November 7, 2024
October 2020	October 22, 2020
November 2019	November 13, 2019