



POLICIES

Worcester Institute for Senior Education
at Assumption University

Effective date November 7, 2024

TABLE OF CONTENTS

Section	Policy	Page(s)
I	Mission and Values	3
II	General	3-4
III	Privacy	4
IV	Communications	4-5
V	Curriculum	5-6
VI	Membership	6-7
VII	Dues	7-8
VIII	Finance	8
IX	Development	8
X	Special Events	8-9
XI	Clubs and Groups	9
XII	Documents and Records	9-10
XIII	Website and Social Media	10
XIV	Recording of WISE Classes	10-11
XV	Zoom	11
	Policies Revision History	12

I. MISSION and VALUES

1. Mission Statement

The Worcester Institute for Senior Education (WISE) at Assumption University is a nonprofit, member-directed organization that provides lifelong learning opportunities for older adults.

2. Values Statement

The Worcester Institute for Senior Education (WISE) at Assumption University fosters a culture of teamwork, participation, acknowledgment, respect, inclusivity, and transparency.

3. Diversity

- a. WISE, as an educational program, complies with all Assumption University Policies, as well as State and Federal Laws prohibiting discrimination in employment and its educational programs on the basis of race, color, national origin, sex, religion, disability, age, marital or parental status, sexual orientation, genetic information or family medical history, military status, or other legally protected status.
- b. WISE strives to provide opportunities for diversity among its members, including their race, color, ethnicity, national origin, sex, sexual orientation, and religion.
- c. WISE strives to provide opportunities for members of the minority community to:
 - i. Participate in WISE membership activities, including in leadership positions
 - ii. Learn from the rich culture of diverse populations
 - iii. Break barriers in communication among members of different communities
 - iv. Participate in the program as WISE Instructors and Spotlight Guest Lecturers

II. GENERAL

The Worcester Institute for Senior Education (WISE) at Assumption University is a program that:

1. Is a part of the School of Graduate and Professional Studies at Assumption University.
2. Follows the principles outlined in the Memorandum of Agreement between Assumption University and WISE
3. Follows the policies and procedures at Assumption University, including, but not limited to:
 - a. Human Resources and Personnel
 - b. Finance and Accounting
 - c. Fund Raising
 - d. Information Technology and related issues
 - e. Classes, events, instructors, rooms, and facilities
 - f. Food Services and other support amenities
 - g. Parking

4. Complies with the discrimination in employment and its educational programs on the Assumption University Anti-Discrimination Policies as well as all state and federal laws prohibiting basis of race, color, national origin, sex, religion, disability, age, marital or parental status, sexual orientation, genetic information or family medical history, military status, or other legally protected status.
5. The WISE Council and the President of Assumption University, or their designees, review their affiliation every four years, or earlier if necessary.
6. The WISE logo shall be used on all appropriate WISE documents, to ensure that the WISE brand is maintained

III. PRIVACY

1. The WISE Privacy policy and practices are in accordance with Assumption University's Privacy Policy
2. WISE does not make available information about WISE members to outside organizations or individuals without the member's permission
3. WISE does not store credit card information on the WISE website or in the WISE office
4. The WISE office staff and website administrators use member information in the course of their work, such as reviewing membership payments, course registrations, event registrations, and communications
5. Members may restrict the type of personal information in the privacy settings in the website guide
6. The WISE Directory is visible only to current WISE members and is limited by the member's privacy settings

IV. COMMUNICATIONS

1. WISE communications will follow the Communications Policies of Assumption University
2. The WISE office ensures that WISE Membership is kept apprised of all noteworthy events pertaining to WISE and its leadership
3. Publications and announcements made on behalf of WISE are done by email, bulletins, and social media
4. The timing and schedule of communications is the responsibility of the WISE office
5. Communications related to the cancellation of WISE classes or events for any reason will adhere to the following:
 - a. WISE classes or events may be cancelled due to inclement weather, security concerns, or other incidents as determined by WISE and Assumption University
 - b. Every attempt will be made to provide notification to WISE members in a timely manner
 - c. Inclement weather is defined as: rain, hail, snow, high winds, extreme high or low temperatures by virtue of which it is not reasonable or safe to travel or walk to class
 - i. In the event of inclement weather, the Director shall determine if the Worcester Public Schools and Assumption University are closed, then

- ii. Confer with the Program Assistant, and determine if WISE classes should be cancelled
- d. If cancellation is determined (for inclement weather or any other unforeseen circumstance) the WISE Membership will be notified via email and/or text message of the cancellation
- e. A voicemail message regarding the cancellation will be recorded on the WISE office main phone

V. CURRICULUM

1. The academic semesters and timing, as defined by the Curriculum Committee in partnership with the WISE office are as follows:
 - a. Fall Semester (Sessions A and B)
 - i. Classes are held September through December
 - ii. Registration for Fall classes begins in August
 - b. Spring Semester (Sessions C and D)
 - i. Classes are held February through May
 - ii. Registration for Spring classes begins in December
 - c. Summer Session
 - i. Classes are held in June and July
2. Any Instructors being considered for teaching at WISE, who have been or currently are on the Faculty at Assumption University, will need the approval of the University before they can teach at WISE
3. The processes for enrollment are outlined on the WISE website and may change periodically
4. Only those members enrolled in the course may attend scheduled classes
5. For the purposes of acquainting a potential member to WISE, a member may bring a friend to one class, provided:
 - a. Prior approval has been obtained from the Instructor
 - b. The Class Assistant is informed as a courtesy
6. An Instructor may bring a guest to one class for the purpose of that guest getting acquainted with WISE
7. In collaboration with the Director and the Finance Committee designee, the Curriculum Committee designee prepares the budget for each year to include:
 - a. The stipend for each Course Instructor in the Academic Year (Fall and Spring Semesters)
 - b. The stipend for each Course Instructor in the Summer program, which must be in keeping with the stipend for Instructors in the Academic Year
 - c. The stipend for each Coordinator of the Special Interest Groups, which must be in keeping with the stipend for Instructors in the Academic Year
8. The budgets are submitted to the Director for subsequent approval by the Finance Committee and the WISE Council

9. It is recommended that all Instructors read the "Guidelines for Instructors" published on the WISE website

VI. MEMBERSHIP

1. Types of Membership

- a. Full-Year Membership
 - i. Includes Fall and Spring Semesters (Sessions A, B, C and D)
 - ii. Full-Year Memberships run from June 15 to June 15 the following year
 - iii. Full-Year Memberships can be renewed annually starting on June 15
- b. Half-Year Membership - Fall
 - i. Includes Fall Semester (Sessions A and B)
 - ii. Half-Year Fall Memberships end on December 15
- c. Half-Year Membership - Spring
 - i. Includes Spring Semester (Sessions C and D)
 - ii. Half-Year Spring Memberships end on June 15
- d. Summer Participant: June and July. This is an administrative classification. Summer Participants are not WISE members and are not eligible for membership benefits.
- e. Instructor: Concurrent with the sessions that the Instructor is teaching. This is an administrative classification. Instructors cannot register for WISE courses unless they belong to another membership category.

2. Honorary Membership

- a. Honorary Membership is granted for:
 - i. Recognition of exceptional service to WISE or the community
 - ii. The promotion of special causes such as diversity
 - iii. Teaching twenty (20) courses or more (excluding Summer courses), over the previous ten (10) years at WISE
- b. Honorary Membership is:
 - i. Granted upon recommendation by the Council
 - ii. Contingent upon maintaining active membership
- c. Honorary Membership is considered 'active' if the member is:
 - i. Participating in taking courses
 - ii. Engaged in teaching activities in WISE
 - iii. Participating as a Volunteer in WISE
- d. An Honorary Member whose membership status becomes Inactive will become a Member Emeritus
- e. The total number of Honorary Members is limited to fifteen (15) each Academic Year
- f. The list of Honorary Members shall be reviewed at the Council's discretion
- g. Honorary membership entitles members to the full privileges of membership
- h. The Summer session is not an included benefit for Honorary members and they must pay the course fee(s)

- i. Although not required, Honorary Membership does not preclude the member from paying dues, or making donations to WISE
- 3. Full Time Equivalents (FTEs): For purposes of financial calculations by WISE and the Assumption University Finance Department, WISE Members are counted in the following manner:
 - a. 1 FTE = Membership in Fall **and** Spring Semesters
 - b. 0.5 FTE = Membership in Fall Semester **or** Spring Semester
 - c. Summer Participants are not counted in the FTE measurement; this is a separate category for financial reporting
- 4. Organizational Memberships
 - a. This designation is for organizations such as senior centers, nursing homes and assisted living facilities that purchase Full- or Half-Year memberships.
 - b. Allows the residents/patrons of a member organization to participate in Zoom-based WISE courses, either live when presented or later via the class recording(s).
 - c. Organizational membership excludes in-person classes and events offered on site at Assumption University.
 - d. Organizational memberships are issued in the organization's name and email, so participants do not need their own individual membership.
 - e. Access to the course links and materials are via the WISE website, using the member organization's logon credentials.
 - f. Organizational Memberships follow the same semester schedule as individual memberships.
 - g. Organizational Memberships are subject to the same policies and procedures as individual memberships.

VII. DUES

- 1. The dues for the Full-Year Membership, Half-Year Membership, Summer Courses and Organizational Membership are determined by the Finance Committee and are approved by the WISE Council for each academic year.
- 2. These dues are published on the WISE website at the start of each academic year.
- 3. Members may upgrade their membership from the Half-Year (Fall Semester) Membership to Full-Year Membership by paying the difference (Full-Year Dues *minus* the Half-Year Dues).
- 4. Dues-paying Members are entitled to the full benefits of WISE membership for the duration that the membership is valid.
- 5. Only currently active members can participate on the WISE Council and Standing Committees
- 6. The Director and Program Assistant shall not pay any dues
- 7. As a part of the non-profit status of WISE and in keeping with the mission of Assumption University the annual dues or a portion thereof may be forgiven for those who demonstrate financial hardship as determined by the Director.
 - a. The total number of such members shall be limited to five each year

- b. For those who qualify, the fee for one summer course will be forgiven
- c. These members will not be identified publicly and will be counted only in internal WISE documents

VIII. FINANCE

1. WISE financial statements will follow the General Accounting Principles (GAAP) as outlined by Assumption University
2. The Academic or Fiscal Year shall be from June 1 through May 31 of the following year
3. The WISE Director shall be:
 - a. Allowed discretionary funds, the amount of which shall be recommended by the Finance Committee and approved by the WISE Council each year
 - b. Responsible for all operational expenses of WISE
4. The budgetary process shall follow these guidelines:
 - a. The budget assumptions and parameters shall be first recommended by the Finance Committee
 - b. The operational budget shall be determined by the Director and submitted to the Finance Committee
 - c. Standing Committee designees shall complete the Budget Request Form in collaboration with the Director
 - d. The collected Budget Request Forms shall be submitted by the Director to the Finance Committee
 - e. The final budget is approved by the WISE Council

IX. DEVELOPMENT

1. All development and fundraising activities shall comply with the policies of Assumption University
2. The annual fundraising drive consists of soliciting donations to one or more of the following:
 - a. WISE General Fund
 - b. Targeted Funds for WISE or Assumption University
 - c. Gifts made in memory/honor of an individual
3. All donations are to be made payable to Assumption University/WISE
4. Bequests may be made by individuals to WISE
5. All donors to Assumption receive a gift receipt from University Advancement

X. SPECIAL EVENTS

1. The Special Events Committee shall identify, schedule, and execute Special Events on behalf of WISE Members throughout the fiscal year

2. Special Events are for WISE members only, unless otherwise stated
3. Special Events may include, but are not limited to:
 - a. Brown bag lectures
 - b. Local trips/excursions
 - c. Music performances
 - d. WISE Annual Meeting
 - e. WISE Holiday Lunch
 - f. Worcester Night
4. Speakers for Special Events may be asked to participate in WISE Special Events on campus or via Zoom
5. Special Events are self-funded by WISE Members, with the exception of Speakers' fees
6. The Special Event designee, in collaboration with the Director, shall prepare the Annual Budget and submit it to the Finance Committee
7. The Director and Program Assistant are exempt from paying fees for each Special Event, including any transportation fees, for those Special Events that require their presence as determined by WISE
8. The Director and Program Assistant, the Assumption University President, and other selected Assumption University staff and their guests, as pre-determined by the WISE Council, shall be invited guests of WISE at the Annual Meeting, Holiday Lunch, and Worcester Night and shall be exempt from paying fees.

XI. CLUBS and GROUPS

1. WISE encourages its members to identify, form and conduct meetings of special clubs and groups, based on areas of common interest
2. Clubs and groups shall adhere to all WISE and Assumption University documented policies
3. Clubs and groups shall be member-led and open to all members; members may be allowed to invite guests, as determined by the individual club guidelines and in accordance with stated WISE and Assumption University policies
4. WISE clubs and groups may include, but are not limited to:
 - a. Book clubs
 - b. Movie clubs
 - c. Special Interest Groups (SIGs)
 - d. Other topical discussion groups
5. Clubs and groups are self-funded by WISE members

XII. DOCUMENTS and RECORDS

1. All documents and records must be kept in the WISE office
2. These include copies of:
 - a. The Agreement between WISE and Assumption University

- b. WISE Bylaws
 - c. WISE Policies
 - d. WISE Roles and Responsibilities
 - e. Charters and Membership of the WISE Standing Committees, Groups and Clubs
 - f. Minutes of the WISE Council and Standing Committee meetings
 - g. WISE Annual Meeting Minutes
 - h. WISE metrics and measures
 - i. Employment contracts of the Director and Program Assistant
 - j. Contracts between WISE and other entities
 - k. List of past and present WISE organizational personnel
 - l. Past and present course catalogs
 - m. Membership records
 - n. Archival materials
3. All records must be kept in a safe place, with electronic copies of the above-mentioned records and others, stored in the "cloud" or similar back-up system. Paper copies of selected records are maintained in the WISE office.

XIII. WEBSITE and SOCIAL MEDIA

1. The Director is responsible for the administration and maintenance of:
 - a. All content on the WISE website at <https://assumptionwise.org>
 - b. All WISE content on social media, including Facebook, LinkedIn, YouTube, and other channels that may be identified in the future
 - c. Other electronic content used by WISE for promotional or marketing purposes
2. All information collected by WISE on the website shall be governed by the WISE privacy policy and the policies of Assumption University
3. The WISE website is not to be used for advertising for events or entities other than WISE and Assumption University
4. The Director and Program Assistant have primary access to the WISE website and thus have ownership for updating and maintaining the site
5. Other individuals may be granted access to a portion of the WISE website to facilitate the execution of their responsibilities

XIV. RECORDING OF WISE CLASSES

1. General
 - a. This policy addresses audio/video recordings which may be made from online or in-person sessions, and the distribution thereof to participants of WISE classes and meetings.
 - b. WISE classes and meetings may be recorded and distributed to WISE members under the following conditions:

- i. The Instructor or meeting convenor assents to the recording
 - ii. The participants are informed prior to the start of the session
 - c. With the permission of the Instructor and the Director, a recording of the entire class or a selected segment may be made available for promotional or training purposes by WISE
- 2. Copyrighted Material
 - a. The use of copyrighted material by WISE, its members and its instructors shall adhere to Assumption University's Intellectual Property Policy
 - b. This policy shall comply with any other related policies of Assumption University
- 3. Recording and Distribution of WISE Classes
 - a. WISE offers some classes online via Zoom which are recorded and distributed to WISE members; WISE also records select in-person classes via Zoom
 - b. All Zoom classes are automatically recorded and maintained in the Zoom cloud
 - c. The recording may be edited to remove extraneous material at the start and end of each class session
 - d. A link to the prepared recording shall be posted to the WISE website, where they are accessible by WISE members only
 - e. Recordings shall be available for 30 days following the class meeting
 - f. With approval from the Instructor, some course recordings may be shared with some retirement or senior organizations
- 4. Course Materials
 - a. Instructors send course materials to the WISE office staff who post those documents and links on the WISE website for class participants to access
 - b. Materials are removed from the WISE website 30 days after the conclusion of the session

XV. ZOOM

- 1. WISE currently holds twenty (20) Zoom licenses. These licenses are used for the purposes of training, conducting WISE classes, and the convening of WISE Clubs, Special Interest Groups, Spotlight Lectures, and Standing Committees.
- 2. The Zoom licenses shall be used for the sole purpose of conducting official WISE business, including but not limited to those listed above.
- 3. The Director is the owner of the WISE Zoom account and is responsible for administering and maintaining the licenses.
- 4. WISE members who have been selected and trained to be Zoom "Hosts" for WISE online sessions may be given one use of the Zoom licenses for this purpose.
- 5. No WISE meetings will be recorded via Zoom without the express prior consent of the meeting convenor.
- 6. Under no circumstances should WISE Zoom licenses be shared with unauthorized individuals or used for any purpose other than to conduct WISE business as noted above.
- 7. This policy extends to other videoconferencing platforms, including Zoom.

Policies Revision History

Effective Date	WISE Council Approval
November 2024	November 7, 2024
January 2022	January 19, 2022
November 2021	November 17, 2021
December 2020	December 16, 2020
March 2020	March 11, 2020
June 2017	June 2017
October 2016	October 2016
February 2014	February 2014
November 2012	November 2012