

HOW SLR WORKS

Organization Structure

Roles and Responsibilities

Calendars & Forms

APPROVED

April 2025

INTRODUCTION

To understand how SLR operates, we begin with the organization of volunteer committees overseen by the Board of Directors and managed by the Executive Council. Everything is volunteer-run, and detailed task descriptions for each volunteer position and committee within SLR can be found in this document.

The descriptions are organized according to the reporting structure illustrated in the Organization Charts for the Board and the Executive Council. Committees report either to the Board or the Executive Council, as indicated in the hierarchy. Additionally, the Board or Executive Council may occasionally appoint ad hoc committees to review or investigate various issues that may arise. These temporary committees are diverse and not reflected in this document.

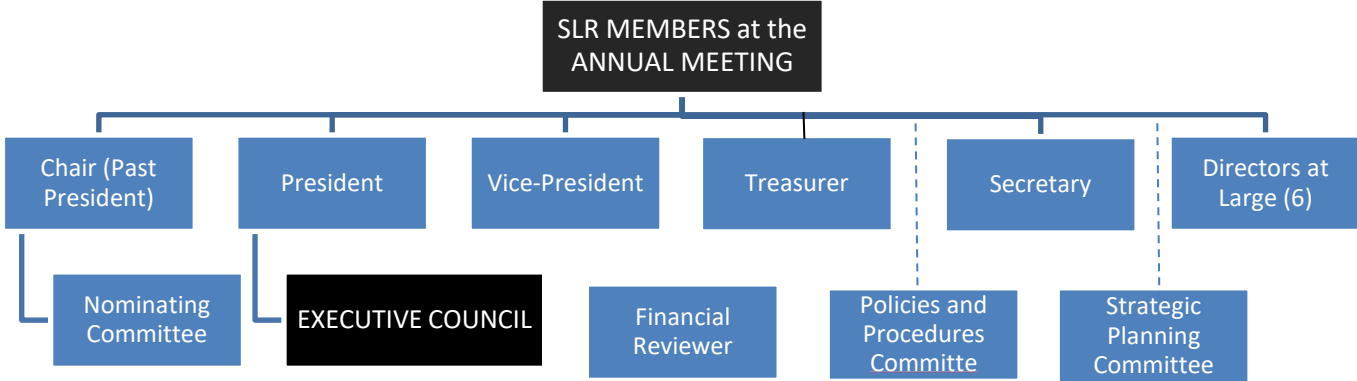
To assist volunteers in scheduling activities, a master calendar is provided in Section 3. Additionally, specific calendars for each committee are included.

In the Appendix, forms used by various volunteers are included in alphabetical order.

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SECTION 1: The Board of Directors



Role of Directors:

- To have full responsibility for the administration and management of SLR
- To always ensure compliance with all laws and by-laws
- To be actively involved in decision-making

Terms of Appointment:

Members of the Board are elected at the Annual Meeting for a three-year term, and can be re-elected for two more years, and then must step down for a minimum of one year. The notwithstanding clause allows for extension of this term “if circumstances require.”

Responsibilities:

- Set SLR’s long range objectives and strategic plans
- Ensure SLR’s financial stability
- Acquire the necessary liability insurance
- Remain aware of the SLR by-laws and charter, and ensures that by-laws, policies and procedures are kept up to date
- Ensure compliance with Canada Revenue Agency regulations and Ontario Law
- Ratify appointments of Executive Council Committee Chairs
- Reviews and, as needed, amends policies and by-laws
- Reports to the Members at Annual Meetings

Meetings: As required, with a minimum of twice a year and Annual Meeting

CHAIR (PAST-PRESIDENT)

Role:

- To provide leadership to the Board, ensuring the integrity of the Board's process
- To co-ordinate Board activities in fulfilling its governance responsibilities, and to ensure the Board discusses all matters relating to the Board's mandate
- To facilitate co-operative relationships among Directors and between the Board and the Executive Council
- To represent the Board to outside parties

Terms of Appointment: One-year term, normally after being President for one year. Eligible for re-election as Director-at-Large for up to two more years.

Responsibilities:

- Convenes and chairs meetings the Board of Directors
- Reports regularly to the Board on issues relevant to its governance responsibilities
- Chairs the Nominating Committee, and presents a proposed slate of Directors and Officers at the Annual Meeting
- May participate on the Executive Council as a Non-voting member
- Organizes and chairs the Annual Meeting
- Is signatory for SLR
- Ensures liaison with funding organizations and lease holders of facilities

Calendar: See SLR Master Calendar, Section 5.1

THROUGHOUT YEAR:	Performs above responsibilities following the Master Calendar
MID APRIL - MAY:	First Board Meeting. Meets with new President and Vice-President
JUNE - AUGUST:	Oversees occasional Board business and activities
SEPTEMBER - MARCH:	Oversees Board business and activities, convenes meetings as required
NOVEMBER:	Convenes Nominating Committee
APRIL:	Annual Meeting. Termination of role as Past-President

NOMINATING COMMITTEE

Role: Reporting directly to the Board, to nominate members to be Directors.

Membership: Past-President (Chair), One member of the Board of Directors, Two members-at-large.

Terms of Appointment: Appointed annually by the Board Chair.

Responsibilities:

- Establishes an annual succession plan for the Board
- Makes call for nominations for Directors, at least eight weeks prior to the Annual Meeting
- Accepts nominations from the membership up to six weeks prior to the Annual Meeting
- Interviews potential candidates to be nominated as Directors
- Submits a list of Director nominees to the Board for approval up to four weeks prior to Annual Meeting
- Publishes the names of Director nominees, three weeks prior to the Annual Meeting

Meetings: As required

Calendar:

NOVEMBER

- First meeting: reviews Succession plans for Directors
- Starts search for candidates for Directors for the following year

FEBRUARY

- Requests and accepts nominations for Directorships
- Chair attends Board Meeting to discuss nominations
- Interviews suitable candidates
- Establishes Slate of Nominations for Directorships

MARCH

- Establishes list of candidates for Board approval

TREASURER (DIRECTOR)

Role:

- To support the Board in achieving its fiduciary responsibilities.
- Oversees the financial matters of SLR in accordance with good practice and Federal and Provincial legal requirements

Terms of Appointment: Elected as a Director at the Annual Meeting. Appointed Treasurer by the Board

Responsibilities:

- Has the custody of the funds and securities of SLR and keeps full and accurate accounts of all assets, liabilities, receipts and disbursements
- Receives, deposits and disburses funds
- Deposits all monies, securities and other valuable effects in the name of SLR in such bank, trust company, or registered dealer in securities, as may be designated by the Board
- Ensures that effective financial measures, controls, and procedures are in place
- Reports on financial position to the Executive Council, as required, and to the Board of Directors at least quarterly
- Prepares necessary materials for the annual review
- Presents to the members at the Annual Meeting, the financial statement approved by the Board, together with the report of the person assigned to review SLR books
- Prepares Canada Revenue Agency financial return
- Keeps the list of corporate Directors up-to-date for the government
- Ensures that appropriate insurance policies are in place and current
- Submits payments for membership in external organizations
- Is a signatory for SLR and advises bank of other SLR members with signing authority
- Administers service contracts for telephone, Internet, copier, etc.

Calendar:

QUARTERLY:	Prepare a financial statement for the Board of Directors
APRIL:	Provides Reviewer with all financial documents of prior financial year Presents reviewed financial statement from prior year at the Annual Meeting
MAY-SEPTEMBER:	Prepares CRA Financial Statement and submits to CRA (before Sept 30)
FEBRUARY-MARCH	Prepares draft budget for next financial year Presents budget to Board for approval prior to the year end March 31

FINANCIAL REVIEWER

Role: To annually review the financial affairs of SLR.

Terms of Appointment: Nominated annually by the Board and elected by the members at the Annual Meeting.

Responsibilities:

- Analyse all financial records from the Treasurer to assess the accuracy of financial statements
- Prepares a report for the Annual Meeting

Procedures: Review all financial documents including bookkeeping software, invoices, cheque book register, bank statements and investment accounts

Calendar:

APRIL: Performs review after final financial statement is available (year-end is March 31) and before the Annual Meeting (mid-April)

SECRETARY (DIRECTOR)

Role:

- To work collaboratively with the Chair to support the Board in fulfilling its responsibilities.
- To create and maintain the records of the Board of Directors and the Executive Council.
- To ensure that all members of the Board and Executive Council are informed about meetings and locations.

Terms of Appointment: Elected as Director at the Annual Meeting; appointed by the Board.

Responsibilities:

- Advises the Chair on policies, procedures, by-laws, and Rules of Order
- In collaboration with Chairs, prepares agendas for Board and Executive Council meetings
- Distributes the agenda and any reports before the meeting
- Assists Chair to conduct meetings with decorum following Roberts Rules of Order
- Records Minutes of meetings of the Board, the Annual Meeting and the Executive Council, and distributes these to members
- Ensures that all reports are filed as required by law or requested by the Board
- Ensures SLR documents are archived appropriately and liaises with the Office Administrator to ensure that corporate records and ongoing history are retained

POLICIES AND PROCEDURES COMMITTEE

Role:

Reporting directly to the Board, to review and update SLR Policies and Procedures

Membership:

Five members of the current or past Board of Directors

Responsibilities:

- Make changes and updates to policies and procedures documents as requested by the Board
- Make sure the most up-to-date policy and procedure documents are available on the SLR website

Meetings: As required

STRATEGIC PLANNING COMMITTEE

Role:

Reporting directly to the Board, to review and update SLR strategic planning initiatives

Membership:

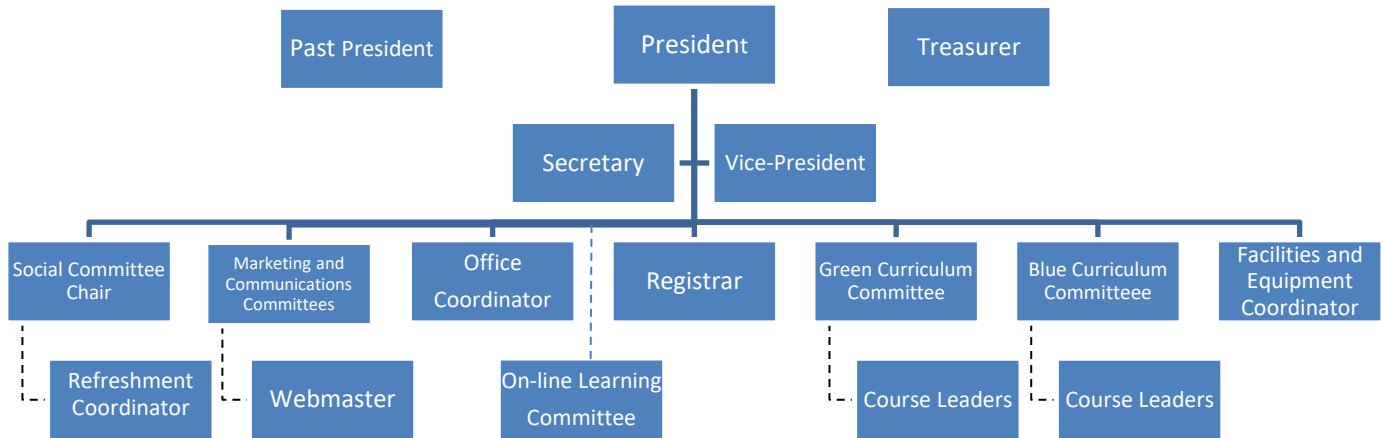
Five members of the current or past Board of Directors

Responsibilities:

- Review current Strategic Plan and report on progress in achieving goals
- Propose a new Strategic Plan every three years to the Board
- Inform the membership at the Annual Meeting of Strategic Plan

Meetings: As required

SECTION 2- The Executive Council



Role: To execute all daily business and activities of SLR.

Membership: President (Chair), Vice-President, and Board Secretary
 Past President and Treasurer (for information when required, non-voting)
 Registrar and Office Coordinator
 Facilities and Equipment Coordinator
 Webmaster
 Chairs of the following Committees:
 Curriculum Committees Green and Blue
 Social Events Committee
 Marketing and Communications Committees
 On-line Learning Committee

Meetings: Bi-Monthly or as required

Terms of Appointment: See individual Position Descriptions.

Responsibilities:

- Committee reports are reviewed and any actions required are resolved
- Procedures and activities to further enhance SLR programs and efficiencies are discussed
- Ad hoc committees may be established to investigate and recommend possible action
- Items with financial or broad policy ramifications are forwarded to the Board

PRESIDENT (DIRECTOR) – Chair, Executive Council

Role: To oversee and direct all daily business and activities of SLR and report to the Board of Directors.

Terms of Appointment: One-year term. Normally becomes President after one year as Vice-President, then becomes Past-President/Board Chair after one year as President.

Responsibilities:

- Ensures that programs are consistent with the values and purpose of SLR
- Acts as advisor, mentor and resource person for all members
- Acts as mediator should disagreement or dispute arise
- Convenes and Chairs Executive Council meetings (see 4.2)
- Encourages cooperation and consensus at meetings and during day-to-day activities
- Ensures that all committees and officers meet their responsibilities
- Attends Board Meetings
- Is a non-voting member of all committees
- Reports to the membership through the President’s Messages (Sept., Nov., and March)
- Hosts luncheons at the Festive Banquet, Founder’s Day and Annual Meeting
- Attends Workshops and Appreciation events
- Presides at the Winter and Fall Previews and attends Open Houses
- Ensures that SLR maintains a good public image and serves as primary contact for the general public
- Is a signatory for SLR

Meetings: See Executive Council and Board of Directors

Calendar:

MID APRIL - MAY: Starts new Role. Meets with new Vice-President and Past-President
THROUGHOUT YEAR: Performs above responsibilities following the Master Calendar
JUNE - AUGUST: Oversees occasional business and activities
SEPTEMBER - MARCH: Oversees programs and activities
APRIL: Transfers role to Vice-President, takes over as Chair of the Board

VICE-PRESIDENT (DIRECTOR)

Role: To assist the President in directing and managing the activities of SLR, and to act in place of the President when required.

Terms of Appointment: Elected as Director at Annual Meeting. Appointed by the Board for a one-year term. Normally becomes President after one year as Vice-President.

Responsibilities:

- Attends meetings of the Board of Directors, the Executive Council and the Annual Meeting
- Acts for the President in all matters if he or she is unavailable
- Prepares for taking on the role of President the following year
- Attends Open Houses, Previews, Workshops and Social Events
- Attends occasional committee meetings in order to learn SLR procedures
- Manages special projects as requested by the Board
- Is a signatory for SLR

Meetings: See Executive Council and Board of Directors

REGISTRAR

Role: To register members and maintain registration data **and to** control enrolments in groups and to provide course leaders and other administrators with needed information

Terms of Appointment: Recommended to the Board by the Executive Council. Length of term is undetermined.

Responsibilities:

- Administers the registration process using registration software
- Ensures that all those registering are treated in a fair and equitable manner
- Advises Curriculum Committee chairs of the progress of registrations in their groups
- Identifies when group is full and maintains wait lists
- Notifies registrants if course is cancelled
- Provides contact details of Group registrants to course leaders
- Maintains a database of current and past members
- Maintains a membership email mailing list
- Collects membership and course/activity fees
- Forwards fees received with a conciliation statement to the Treasurer
- Prepares charitable donation income tax receipts
- Provides registration statistics for the Executive Council
- Ensures compliance with privacy policy

Calendar:

PRIOR TO START OF FALL/WINTER/SPRING TERMS:

- Supervises registration
- Prepares registration forms
- Receives and enters new registrations
- Maintains group waiting lists
- Prepares group lists for course leaders

FEBRUARY

- Prepares and mails out charitable donation tax receipts

DURING EACH TERM

- Maintains all funds received and assists the Treasure with reconciliation reports
- Adjusts Group lists as membership or personal details change

OFFICE COORDINATOR

Role: To coordinate all office activities; including, but not limited to, telephone and email communications, the printing and distribution of documents, and smooth running of Office.

Terms of Appointment:

- Recommended to the Board by the Executive Council, length of term is undetermined
- Is available on a regular and frequent basis throughout most of the year.

Responsibilities:

- Manages in-coming communications (e-mails, mail, telephone calls, messages, etc.)
- Assists Registrar with processing registrations
- Assists with printing of Brochures, tent cards, tickets, etc.
- Sends out hard copy information to members who do not use email
- Prepares course participant tent cards or name tags to course leaders
- Ensures that office supplies are ordered and available
- Coordinates office assistants when required
- Reports to the Executive Council
- Ensures compliance with privacy policies
- In cases of severe illness or death of a member, provides appropriate correspondence

CURRICULUM COMMITTEES BLUE AND GREEN

Role: To develop topics suitable for study, discussion and activity courses based on a peer-learning model for each term

- Study Groups cover topics that are large in scope and that provide many areas of research and different points of view and require a short presentation by enrolled members.
- Activities, Workshops and Discussion Groups emphasize active learning
- Interest Groups allow members with a shared interest to meet on a regular basis

Membership: Chair and other members as required

Responsibilities of Chairs:

- Schedule regular meetings and make appropriate notifications
- Liaise with the other Committee Chair to coordinate course titles, content, course leaders and schedule
- Represent the committee on Executive Council and provide a written or oral report
- Attend all Open Houses and Previews

Responsibilities of Curriculum Committees:

- Develop courses and schedules for each term
- Recruit appropriate and available Course Leaders for all courses
- Work with them to develop content
- Send Program, in digital format, to the Chair of the Communications Committee
- Notify course leaders of their scheduled course time and location, course management requirements and the names of contact people for any questions or concerns
- Solicit suggestions for future courses from SLR members

Meetings: The committees meet as required, typically monthly or bimonthly

Calendar:

MAY-JUNE

- Early development of Winter course program
- Fall Preview

AUGUST-SEPTEMBER

- Confirm Fall meeting dates
- Open House

SEPTEMBER-OCTOBER

- Winter Program Planning: Liaise with other program committee Chair; provide Executive Council with proposed Winter program; confirm Winter schedule and descriptions with Course Leaders; prepare draft of Winter program for brochure
- Assist Social Chair on theme/speaker for Founders' Day Lunch

NOVEMBER-DECEMBER

- Early development of Spring program
- Plan for Winter Open House

JANUARY-MARCH

- Open House
- Spring Program planning, provide Executive Council with proposed Spring program; confirm Spring schedule and descriptions with Course Leaders; prepare draft for Spring program for brochure

MARCH-APRIL

- Fall Program planning. provide Executive Council with proposed Fall program; confirm Fall schedule and descriptions with Course Leaders; prepare draft of Fall program for brochure
- Plan Fall Preview
- Consult with Social Chair on Spring/Summer/Fall social events

COURSE LEADERS

Role: To ensure membership satisfaction through leadership of courses that stimulate interactive learning in a respectful and supportive environment. These groups may be any of the following: study groups, discussion groups, workshops, activities and interest groups.

Membership: Course leaders are members who have the interpersonal and organizational skills to lead a group and for some groups may require specialized knowledge or skills. They are recruited by one of the Curriculum Committees, and may have a co-leader.

Responsibilities: See Course Leaders Checklist (Appendix) which is provided before each session to all course leaders and at the Course Leaders Workshop.

ON-LINE LEARNING COMMITTEE

Role: To assist Curriculum Committees and Course Leaders to provide some on-line courses or hybrid courses during each session.

Membership: May include the Facilities Coordinator, Webmaster or other members as required.

Responsibilities:

- Ensure the audio-visual equipment required for on-line courses is working well
- Provide training for course leaders of on-line courses
- Ensure that each on-line or hybrid course has a Zoom host

Meetings: As required

SOCIAL COMMITTEE

Role: To organize events to enhance members' social experience and enjoyment as members of SLR.

Membership: Members include the Chair and other members as required.

Responsibilities:

- Plans and facilitates social functions
- Presents plans, venues and budgets for social events to the Executive Council
- Attends Executive Council meetings and submits written reports
- Attends Blue Curriculum Committee meetings to develop event planning
- Promotes social events at Open Houses and Program Previews
- Submits monies collected for all social events to the Treasurer with a conciliation statement
- Ensures Waiver Forms (See Appendix) are signed for off-site events if necessary
- Advertises events by informing the Web Master, Newsletter, Facebook and updating the bulletin board
- Provides information to the Marketing and Communications Committee for brochures and other advertising

Meetings: As required

Calendar:

APRIL – MAY – JUNE - JULY

- Organize April Spring Luncheon and Annual Meeting,
- Organize social events for spring and early summer months
- Plan Meet and Greet Luncheon for September.

SEPTEMBER – OCTOBER- NOVEMBER

- Meet and Greet luncheon in early September
- Organize social events for October and November

DECEMBER

- Festive banquet during the first week of December

JANUARY-FEBRUARY

- Organize the February Founder's Day Lunch around Valentine's Day

MARCH

- Plan spring social events

REFRESHMENT COORDINATOR

Role: To ensure members are provided with refreshments during classes and public events.

Terms of Appointment: Recommended to the Board by the Executive Council, length of term undetermined.

Responsibilities:

- Ensures that refreshment supplies are purchased and available
- Ensures kitchen facilities and serving equipment are in good order
- Identifies, trains and schedules volunteers to set up and clear refreshments for classes, meetings, Open Houses, Previews, etc.
- Discusses issues with Social Committee Chair\

See Appendix "Coffee Servers' Checklist"

MARKETING & COMMUNICATIONS COMMITTEES

Role:

- To develop strategies for recruiting SLR members.
- To maintain internal and external communications, including advertising and brochures.
- To report to Executive Council

Membership: Co-Chairs, Web Master, Newsletter Editor, other members as required

Terms of Membership:

CHAIRS: Recommended to and approved by the Board, non-specified term

Responsibilities:

- Develops and distributes marketing materials, which together with the website present a professional image consistent with our mission and objectives
- Ensures internal communications are available through the website, program brochures, newsletters, president's message, email, mass email and Facebook
- Assists president to develop and distribute the president's message
- Provides materials and support for the SLR Web Master and Newsletter Editor
- Organizes and attends Open Houses and Program Previews
- Organizes and attends community outreach events
- Consults with the Executive Council, and provides written reports
- Consults with appropriate committee chairs on communication/marketing strategies and procedures

Calendar

APRIL

- Attend the Spring Open House and Annual Meeting
- Determines dates for Fall Program Preview, Open House, Presentation and Course Leaders Workshops, as well as Brochure deadlines with Registrar and Executive Council
- Liaise with Curriculum Committee Chairs, Webmaster, external graphic designer and Chair re timelines for Fall Brochure content, setup, reviewing, printing and distribution

MAY-JUNE

- Finalize and distribute Fall brochure
- Organize and attend the Fall Program Preview
- Review marketing materials to see if changes are required. If minor, use correction stickers or inserts. If significant, determine plan of action and deadlines

AUGUST

- Arrange paid and free advertisements for Fall Open House (LFP insert, Reader to Reader, the Londoner, community newspapers, etc.)
- Liaise with Webmaster to ensure website up-to-date

SEPTEMBER

- Orchestrate the Fall Open House preparations
- Ensure that all appropriate brochures/materials are available for Open House
- Attend Open House as a Goodwill Ambassador

OCTOBER

- Arrange for paid and free advertising for Winter Program Preview in November
- Ensure deadlines for Newsletter and Winter brochure drafts, editing, finalizing, printing and distribution are met

- Liaise with Webmaster to ensure website up to date

NOVEMBER

- Orchestrate the setup and activities of the Winter Program Preview
- Ensure that all appropriate brochures/materials are available for Preview
- Attend Winter Preview as Goodwill Ambassador
- Review dates for Spring Program Preview, Fall Open House, Presentation and Course Leaders Workshops, and brochure deadlines with Registrar and Executive Council
- Liaise with Curriculum Committee Chairs, Webmaster, external graphic designer and Chair re timelines for Spring brochure content, setup, reviewing, printing and distribution

DECEMBER

- Arrange paid and free advertising for Winter Open House
- Liaise with Webmaster to ensure website up to date

JANUARY

- Orchestrate the Winter Open House preparations
- Ensure that all appropriate brochures/materials are available for Open House
- Attend Open House as Goodwill Ambassador
- Prepare budget proposal for following year to be presented at the February Executive meeting for approval

FEBRUARY

- Arrange paid and free advertising for Spring/Fall Program Preview
- Ensure deadlines for Spring Newsletter and Spring and Fall brochure drafts, editing finalizing, printing, and distributing are met
- Liaise with Web Master to ensure website up to date

MARCH

- Liaise with Curriculum Committee Chairs, Web-Master and external graphic designer and Newsletter Chair re time-lines for Spring brochure content, setup, reviewing, printing and distribution
- Orchestrate the setup and activities of the Spring Open House

WEB MASTER

Role: To ensure that the SLR Website is up-to-date, easy to navigate, and addresses the needs of the Society. This position works with members of various committees to create Web page content as required.

Membership: The Web Master will be sought from among the membership and should be able to work with SLR office software and be able to maintain and update the SLR website.

Term of Membership: Term of membership is undetermined.

Responsibilities:

- Maintains licenses with CIRA (Canadian Internet Registry Authority) and WordPress (software for maintaining website)

- Ensures Web pages are displaying up-to-date information
- Works with various committee members to obtain current information and trains members to post items
- Ensures that web site pages have a consistent “look” and that style and graphics are maintained
- Monitors website use and trends
- Backs-up site pages and supporting files
- Prepares budget for software requirements
- Reports to Marketing and Communications Committee
- Create Program Web pages with files from Curriculum Committees.
- Post Program modifications as received/discovered
- Update links as necessary
- Post and update Calendar for each term
- Create and update promotional content for the Homepage
- Maintain up-to-date Events page
- Update banner image seasonally
- Update volunteer opportunities
- Post and update Executive and Committee descriptions and members
- Backup Site pages and files

FACILITIES AND EQUIPMENT COORDINATOR

Role: To ensure facilities and equipment are in good working order
 To maintain Audio/Visual and office equipment services
 To liaise with the premise's owners

Responsibilities:

- Maintains appropriate conditions for successful program activities
- Assists with physical set-up for Program Previews and Open Houses
- Supports office in acquiring appropriate equipment Maintains classroom Audio/Visual equipment
- Maintains software and installs updates on SLR computers
- Advises on new equipment needs with bud
- Purchases new equipment
- Assists with developing A/V training
- Advises Treasurer of operating budget needs

Terms: No set term.

SECTION 3: SLR CALENDAR MAY 1 – APRIL 30

MAY:

New Financial Year, New Board convenes, Spring term ongoing
Early May: First draft of Fall Brochure due
Mid-to-Late May: Fall Brochure distributed by mail, email and website

JUNE:

Early June: Fall Program Preview and Registration
Mid-June: Spring Term ends.

JULY/AUGUST:

July: Summer Social Event

SEPTEMBER:

End of August/early September: Most Executive committees re-activate
1st week: Fall Open House
2nd week: Meet and Greet Lunch
2nd or 3rd week: Course Leaders and Presentation Workshops
3rd or 4th week: Fall Term Starts (10 weeks)

OCTOBER:

Before End of Month: First draft for Winter Brochure due

NOVEMBER:

By 3rd week: Winter Brochure distributed by email, mail, and on Website
By 4th week: Winter Program Preview

DECEMBER:

2nd week: Festive Luncheon
By 2nd week: Fall term ends (Make-up sessions as required)
Dec. 20 ~ Jan. 5: SLR Office and Facilities will not be functioning

JANUARY:

1st or 2nd week: Most Executive Committees reactivate
2nd or 3rd week: Winter Open House and Co-Registration
2nd or 3rd week: Course Leaders and Presentation Workshops
3rd or 4th week: Start of Winter Term (10 weeks)

FEBRUARY:

2nd week: Founders' Day Lunch
Mid-February: Call for Nominations for new Directors and date for Annual Meeting announced
Late February: First Draft Spring Brochure due

MARCH:

Mid-March: Annual Meeting Agenda and Info package distributed (3 weeks before AM)
3rd or 4th week: Spring Brochure distributed by email, mail, and on Website
Last week: Winter Term Ends (make-up sessions in next week as required)

APRIL:

1st week: Spring Open House
2nd or 3rd week: Annual Meeting; New Directors elected.
3rd or 4th week: Spring Term Starts (8 weeks)

Appendix: FORMS

1. Waiver Form
2. Coffee Servers Checklist
3. Course Leaders Check



**SOCIETY FOR LEARNING IN RETIREMENT
Waiver of Liability and Assumption of Risk**

I acknowledge that this activity of the Society for Learning in Retirement, (SLR) in which I am participating, involves risks that are beyond the control of SLR. Notwithstanding the acknowledgement of such risks, I hereby release the Society for Learning in Retirement, its employees, contractors, volunteers, agents, assigns and executors from all claims for any damage whatsoever arising as a result of my participation in this activity organized by SLR. I agree to pay the costs of any emergency evaluation of my person or belongings that may be necessary. I agree to participate. I have no medical or other conditions that might preclude my participation. I agree to follow the instructions of the leader.

My signature below confirms that I am at least 18 years old, that I have read this document and that I fully understand its effect. I also understand that this document must be properly completed before I can participate in any activity of the Society for Learning in Retirement.

SLR ACTIVITY NAME: _____ DATE OF ACTIVITY: _____



	PRINT NAME	SIGNATURE	VEHICLE LICENSE #	PHONE NUMBER	PRINT EMERGENCY CONTACT NAME	PHONE NUMBER
1	Diana Lloyd					
2						
3						
4						
5						
6						
7						
8						

Coffee Servers Checklist

A.M. Set up

- Heat water for tea and place in “hot water” urn
- (in most cases) Make 1 pot of coffee
- Arrange a variety of cookies on server (use cover)

Use small aluminium bowls for sugar & sweeteners

Use tablecloth (stored in first drawer)

Arrange on table in hallway hospitality area:

- Milk and Cream cartons
- Server with Cookies
- Sugar Bowl
- Stir sticks
- Table napkins
- Instant Coffee (with spoon in jar)
- Small Glass-Jar Canister of tea bags
- Tongs for cookies
- LARGE PLASTIC BOWL FOR SMALL GARBAGE

Coffee and hotwater urns are placed on the trolley and Moved into the hallway perpendicular to the table.

Any problems or questions: Contact Refreshment Coordinator

A.M. Cleanup:

- Place milk/cream in fridge
- Empty GARBAGE BOWL in kitchen garbage
- Coffee grounds go in compost bin in garden

Hint: Always wait for the green light to come on the coffee maker before starting a new pot.

P.M.

“Refresh”

Morning setup*

*usually only 1 pot of coffee for afternoon needs to be made

UNLESS there is another ACTIVITY GROUP or DISCUSSION GROUP meeting at the same time as your STUDY GROUP

THEN

Check recommendation

P.M. Cleanup:

- Put items from table away in refrigerator and cupboard regular storage spots
- Empty coffee and water urns
- Rinse coffee urns and clean with brush (beside coffee maker)
- Empty garbage bowl in kitchen garbage
- Rinse and dry garbage bowl
- Coffee grounds go into compost bins in garden
- Return trolley to kitchen between coffee maker and cupboard

Course Leaders Checklist

PRIOR TO THE FIRST CLASS:

- When you receive your Course Enrollment from the Registrar, contact all members registered for your course by phone or email, with a special welcome to new members. Remember to bcc all members if emailing. Verify times, dates, answer any questions, and, if applicable:
 - for Study Groups: ask them to send you their presentation topic and/or date soon. Occasionally circulate the presentation schedule to class members to avoid duplication of topics/presentation dates.
 - And, of course, answer any questions
- If your course does not fill, you can discuss the options available with your curriculum committee chair and the class before shortening or cancelling.

FIRST SESSION: Arrive early to

- Get tent cards and class list from coffee area bookshelf
- Make sure the room is set up properly and equipment ready to go
- Cordially welcome everyone as they arrive
- Introduce any new member to a “buddy”
- Start class on time
 - Welcome everyone; introduce self and why you wanted to lead class
 - Request participants to turn off cell phones
 - Clarify the purpose, objectives and class conduct for the course (i.e., arrive on time; 1 person speaks at a time; use of tent cards; maximum 2-3 minutes to speak; no side conversations; maintain respect for all)
 - Spend time with introductions – can tie the introduction to the topic in order to keep focus (i.e., name? what did you do before you retired? how long a member? why this topic? what do you most hope to learn?). Some leaders have paired participants so they can “interview” each other; other leaders go around the room and let each member introduce themselves.
 - For Discussion Groups, ensure everyone knows they are responsible for researching/thinking about the topic(s) each week and adding to the conversation
 - Then launch into the first topic (often after the 10-minute break). It is a good practice to present the first topic yourself to role model the role and expectations.
 - Note any no-shows and contact them (advise Registrar of any withdrawals asap)

EACH WEEK:

- Your task is to keep discussions moving and encourage participation, making sure everyone gets a chance to speak each session
- Make any announcements that are enclosed with the tent cards
- If using the projector, ensure that the laptop is closed and (most importantly!) the projector is completely turned off at the end of your session.

- For Discussion Groups: If appropriate, the class chose the topic(s) for the next session
- Remind members they can invite guests to attend a session if space is available
- Ensure that the room is tidy when leaving and return tent cards to the bookcase

LAST SESSION:

- During wrap-up, express your appreciation and ask for any comments to/about the class.
- If time, and appropriate, collect ideas for possible new activity or study group topics
- Encourage members to sign up for the next term's offerings

MISCELLANEOUS PROCEDURES:

- **Weather Cancellations:**

- Due to adverse weather conditions, no classes will be held if ANY ONE of the following are closed: Western University, Fanshawe College, Thames Valley District School Board, the London Transit System.
- Course leaders will advise class members before 8:00 a.m. by email and schedule a make-up class if possible or run the class by Zoom.

- **Emergency Occurring in the Classroom:** In the event of an emergency situation where a member is experiencing difficulty and appears to need medical attention, arrange for the member to be kept calm and using a cell phone or the main floor office phone, call for an ambulance giving the correct address as:

Grosvenor Lodge, 1017 Western Road, 519/438-3525

Have a class member go to the east door (heading to the ramp) to direct the emergency crew.

In the case of heart failure, a defibrillator is available in the library/coffee area and will automatically lead you through the procedure. Do not hesitate to use it – you can do no harm. Then call 911, giving the address above.

After the situation has been resolved, notify one of the Emergency Response Team members: SLR President, Vice President, or Board Chair.

- **Fire Safety**

If you hear the fire alarm (whether a real fire or a planned/unplanned fire drill):

- Everyone is to leave the building immediately, using the closest door
- Assist those members who have difficulty walking
- Make sure nothing is blocking access for the fire department
- The staff of Grosvenor Lodge is responsible for calling the fire department and will advise you when it is safe to return. Do not attempt to drive out of the grounds until the all-clear has been confirmed.