

SOCIETY FOR LEARNING IN RETIREMENT



OPERATIONS MANUAL

Feb, 2026

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VISION

To provide adult lifelong learning

MISSION

SLR is a welcoming, inclusive environment for educational, cultural and social enrichment

VALUES

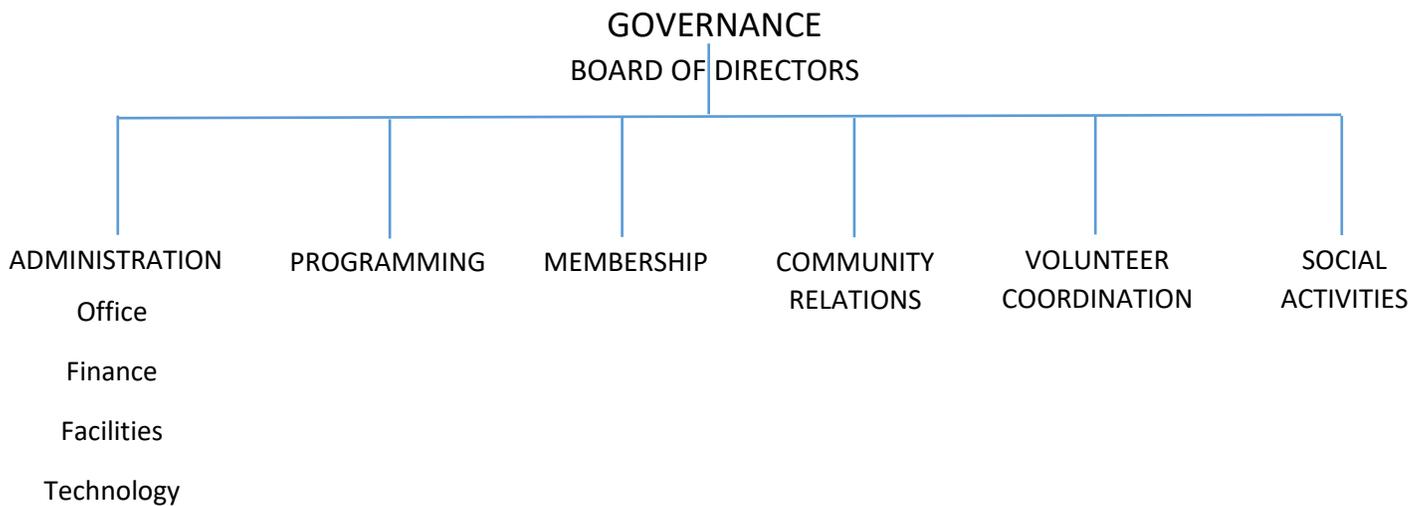
The Society for Learning in Retirement (SLR) is run by a volunteer Board with a mandate to provide lifelong learning in retirement which:

1. Benefits individuals and society
2. Facilitates the pursuit of intellectual interests
3. Promotes peer learning by encouraging member participation and interaction
4. Offers a friendly, inclusive, comfortable and sociable learning environment
5. Promotes intellectual, emotional, physical and social wellbeing for mature adults
6. Responds to the intellectual and social needs and interests of members
7. Benefits communities as well as individuals through collaboration and partnership with other community organizations

ORGANIZATIONAL STRUCTURE

SLR is governed by a working board. The organization is run by volunteers except for the three paid positions of office manager, assistant office manager and bookkeeper. A board member chairs and oversees the function of each area of the organization (see chart above) with the help of volunteers and office staff. Each chair reports to the Board.

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COMPONENTS OF THE ORGANIZATIONAL STRUCTURE

GOVERNANCE - BOARD OF DIRECTORS

SLR is governed by a volunteer board of directors who are elected by the membership every two years. At any one time there are between seven and eleven board members. A member may serve three, two-year terms on the Board.

The Board of Directors manages and monitors the implementation of short-term and long-term goals and provides accountability to the members of the Society for Learning in Retirement (SLR).

The board meets monthly and is responsible for organizing and leading the Annual General Meeting which is held sometime between January and March at the Board's discretion.

OPERATIONS

The operations of SLR are divided into three areas, managed by three committees: Administration, Finance and Facility.

Administration: The paid part-time Office Manager reports to the board, is responsible for administrative duties and provides support to each of the other committees. The paid, part-time Bookkeeper reports to and supports the Board Treasurer.

Finance: The Treasurer heads the Finance Committee, is supported by the part-time Bookkeeper and is responsible for the management of all SLR Finances. The Treasurer participates in all financial decisions and reports to the Board.

Facility: Since SLR depends on considerable audio visual and other equipment to provide varied and accessible programs and events, there is a separate Facilities/Equipment Committee which purchases, inventories, maintains and operates all the equipment and facility requirements.

PROGRAMMING

Programming is at the heart of SLR. The Program Committee Chair, with the help of volunteers, plans, recruits facilitators, schedules and coordinates programs and special events.

MEMBERSHIP

The focus of Membership is on the Society itself, its membership, and volunteers.

COMMUNITY RELATIONS

The focus is on our relationships within the Okanagan community including promotion as well as participation and partnerships with media, organizations and institutions such as UBCO and Okanagan College.

VOLUNTEER COORDINATION

All areas of SLR's organization function with the help of volunteers. Working closely with other committee chairs, the volunteer chair coordinates the recruitment, training, retention, and recognition of all volunteers.

SOCIAL ACTIVITIES

Social activities are an important part of SLR culture. The Social Chair, with the help of a volunteer team, plans and coordinates the providing of refreshments during programs, informal gatherings and board meetings. They host special events for SLR members, volunteers, board functions and the community.



SOCIETY FOR LEARNING IN RETIREMENT

BOARD OF DIRECTORS TERMS OF REFERENCE

TERMS OF REFERENCE – SLR BOARD OF DIRECTORS

Purpose

The primary purpose of the Board is to govern the Society for Learning in Retirement (SLR). The ultimate responsibility for making governance policy and for deciding what SLR will seek to accomplish belongs to the Board. It is the Board, and not individual directors, staff or volunteers that sets direction and policy.

- A. Essential elements of governing are to:
 - Provide guidance and direction
 - Establish standards for organizational conduct (the conditions, constraints and limitations that guide the work of staff and volunteers)
 - Provide oversight of all organizational performances
 - Protect the best interest of the organization
 - Ensure the financial sustainability of the organization
 - Acquire knowledge of member expectations, needs, concerns and interests
- B. A primary responsibility of the Board of Directors is to ensure the long-term success of SLR
- C. The Board has a responsibility to oversee the conduct of the business of SLR and to guide and direct management which is responsible for the day-to-day conduct of business. The Board also considers the legitimate interests which others, such as members and employees, have in the organization. The Board sets standards of conduct for SLR and ensures the safety of its operations.

Procedures and Organization

- A. The Board retains the responsibility for managing its own affairs. The Board:
 - Selects the Chair, Vice-Chair and Treasurer
 - Nominates candidates for election to the Board
 - Provides guidance to the Nominating Committee regarding the criteria they should consider in making their recommendations to the Board
 - Establishes Board committees
- B. Subject to SLR Bylaws, the Board may constitute, seek the advice of, and delegate duties and responsibilities to committees

Duties and Responsibilities

- A. The Board has the responsibility to:
 - Monitor progress of SLR goals
 - Approve the budget and any expenditures that deviate from the approved annual budget
 - Identify the principal risks to SLR and take all reasonable steps to ensure the implementation of appropriate systems to manage these risks
 - Ensure office manager has systems in place to maintain SLR's integrity

B. The Board has the responsibility to:

- Review the mission of SLR, its objectives and goals, and the strategies by which it proposes to reach its goals
- Review progress in achieving the goals established in the strategic plan

C. The Board has a responsibility to:

- Ensure that the financial results are reported fairly and in accordance with accepted accounting principles
- Ensure timely reporting of any other developments that have a significant and material effect on the performance of SLR
- Report annually to its members regarding the preceding year
- Ensure that SLR has a policy to enable the organization to communicate effectively with its members

D. The Board has a responsibility to:

- Develop, approve and monitor compliance with all major policies that govern SLR
- Implement systems designed to ensure SLR operates within applicable laws and regulations and to the highest ethical and moral standards

E. The Board has a responsibility to:

- Maintain SLR's partnership with the Boys and Girls Club of the Okanagan (BGCO) which holds the lease with the City of Kelowna. SLR is the tenant. The SLR Board must obtain BGCO's approval for any alterations or changes pertaining to the Martin Centre building and property
- Ensure that individual Directors do not override decisions made by the Board
- Ensure Directors maintain responsibilities for their duties as per job description
- Ensure Directors assist other directors while respecting the co-ordinator

Legal Obligations of the Board of Directors

A. SLR is incorporated under the Societies Act of British Columbia

B. Directors are required to carry out their duties:

- In the best interest of SLR
- With honesty and in good faith
- With care, diligence and skill

C. Directors have specific statutory duties and obligations under employment, environmental and financial reporting laws as well as under the withholding provisions of taxation laws



SOCIETY FOR LEARNING IN RETIREMENT

RULES & POLICIES

RULES

- Support dogs must be certified with papers to be allowed in the BGC facility
- Bikes are not allowed in the BGC facility. A bike rack is available at the back entrance of the building for use by SLR members
- Personal advertising is not allowed. Outside organizations and members can use the bulletin board in the lunchroom to advertise their involvement in fundraising projects and/or services available for members of SLR
- Presenters leading a course on a book they have written are allowed to promote their work
- SLR is a nut-free and a fragrance-free building. Individuals might be asked to leave if a fragrance is detected

POLICIES

SENSITIVE INFORMATION POLICY

This policy is a set of rules and guidelines that define how the Society for Learning in Retirement (SLR) handles and protects the data, including the information about members, that is sensitive, confidential and/or personal

SCOPE

This policy affects all users, board members and volunteers who may have access to confidential information
Definitions and examples of what constitutes confidential information:

- Financial information (credit cards)
- Data of members

Guidelines on what users should and shouldn't do with confidential information, including storage, access and disclosure:

Measures to ensure that confidential information is well protected:

- Paper documents will be stored in a locked cabinet
- No credit card information shall be taken over the phone
- Only SLR computers will be used for the registration process
- Board must approve the establishment and installation of new software and hardware
- Information Security Policy
 - Users are required to comply with Paysafe's Payment Card Industry Data Security Standard (PCIDSS)
- Volunteer Non-Disclosure Agreement (NDA) (see Appendix A)
 - Volunteers handling credit card information are required to sign an NDA
- Employee Non-Disclosure Agreement (NDA) (see Appendix A)
 - Employees (Office Manager and Bookkeeper) are required to sign an NDA
- List of devices (see Appendix A) shall be updated when devices are modified, updated or decommissioned
- SLR will ensure that there is a written agreement with the service provider (see Appendix A)

EXCEPTIONS

- When a regulatory body requests the information as part of an investigation or audit
- To ensure users understand the ramifications of policy violations, disciplinary actions may be taken.
- Disciplinary action may be necessary for breaches of the Sensitive Information Policies

FACEBOOK

- Pictures are not to be posted on any form of social media platform without the written consent of the person

SECURITY AWARENESS AND PROCEDURES

- The board shall review the procedures for handling sensitive information and hold annual security awareness meetings to incorporate the approved procedures into the Society's day-to-day practices
- Users shall confirm that they understand the content of the attached Information Security Policy by signing an acknowledgement form (see Appendix A)
- All users who handle sensitive information will undergo background checks (such as criminal and credit record checks, within the limits of the local law) before they input confidential member information into the system. (www.rcmp-grc.gc.ca)

VOLUNTEERS

Volunteers who have signed up to work for an event will not be charged admission

COURSE WITHDRAWAL

Course registrants can receive a full credit refund of course fees towards future courses as long as they submit the claim 48 hours prior to the start of the course

Policy on Political Neutrality in Educational and Institutional Spaces

Purpose:

This policy is established to maintain a respectful, inclusive, and non-partisan environment conducive to learning, social community, and institutional integrity.

Policy Statement:

The institution is committed to fostering an environment where all individuals feel welcome and respected, regardless of their political beliefs. To preserve the educational and social mission and to prevent the disruption of operations, the use of classes, meetings, workshops, or institutional spaces (physical or virtual) as platforms for political advocacy or partisan activity is prohibited.

Definitions:

- *Political Advocacy:* Any activity that promotes, opposes, or endorses a political party, candidate, or partisan cause.
- *Partisan Activity:* Actions that support specific political parties, candidates, or legislation with the intent to influence others.
- *Institutional Spaces:* Includes classrooms, meeting rooms, virtual learning environments, internal communications platforms, and any other space designated for our use.

Prohibited Conduct:

1. Using instructional time or course materials to promote or oppose political parties, candidates, or ballot initiatives.
2. Displaying campaign materials or distributing political literature during classes, meetings, or in common institutional spaces.
3. Organizing or participating in partisan events using institutional resources, platforms, or branding.
4. Pressuring students, colleagues, or employees to support or oppose any political cause.

This policy does not restrict:

- Academic discussions that objectively analyze political systems, theories, or current events as part of a course curriculum.



SOCIETY FOR LEARNING IN RETIREMENT

JOB DESCRIPTIONS

BOARD OF DIRECTORS

PRESIDENT

Serves as Chief Executive Officer of the Society

- Chairs all regular board meetings. The vice-president shall preside at meetings in his or her absence. A chairperson shall be elected by the board in the absence of both president and vice-president
- Chairs Annual General Meetings and prepares Annual Report for AGM package
- Along with Vice-President, liaises with BGCO re rental contract
- Takes a lead role in the Strategic Planning Process, including an annual review
- Chairs committee for annual review of Sensitive Information policy
- Prepares President's Message for program brochure
- Appoints committees and committee chairpersons
- Welcomes participants to social functions such as Presenters' luncheon, and other SLR-sponsored functions
- Handles written complaints in consultation with Board
- Serves as one of the bank-signing officers for the Society
- Is involved in public relations and fund raising
- Chairs ad hoc committees with two other directors (under Bylaw 2.7.(e))
- Shall be an ex-officio member of all committees

VICE PRESIDENT

- Assumes the duties of President should the President be absent or temporarily incapacitated
- Liaises with the Boys and Girls Club of the Okanagan (BGCO) re rental contract and any other issues along with President and Facilities Chair when required
- Creates long-term facilities planning strategy
- Develops list of potential partnerships
- Develops list of available facilities
- Liaises with Fund Development Chair
- Maintains and updates SLR Society Bylaws
- May serve as one of the bank-signing officers

PAST PRESIDENT

- Attends Board and Executive meetings for two years following their term of office
- This position is advisory and non-voting
- Provides guidance to new board members
- Chairs the Nominating Committee

SECRETARY

- Prepares agenda package in conjunction with the president and sends to Board members at least one week prior to the monthly meeting
- Records and prepares minutes of regular monthly board meetings
- Confirms availability of room
- With Board approval, sets a date for the AGM which shall be held before March 31st of each year
- Maintains and records terms of current Board members in conjunction with office manager
- In consultation with the President prepares the AGM agenda package including previous year's AGM minutes, proxy form, financial statements, bylaw and policy changes
- Records and prepares minutes for the AGM and distributes draft minutes to board for revision and approval
- Works with Office Manager to distribute AGM packages (electronically) one month prior to AGM
- Organizes volunteers to help at the Registration table
- Ensures that the approved AGM minutes are sent to Webmaster
- Responds to internal and external Society correspondence
- Serves as one of the Society's signing officers
- Manages and archives Board-related documents

TREASURER

Reviews and monitors transactions entered by the bookkeeper

- Receives, records, and deposits incoming cheques
- Prepares and issues cheques for payment
- Prints Quick book statements for the Treasurer
- Enters journal and recurring entries provided by the Treasurer

Prepares the following monthly reports for Board approval

- Monthly Balance Sheet
- Monthly Profit and Loss and Year-to-date reports
- **Monthly Income Statement**
- Monthly update on current changes or issues

Prepares the following reports for membership approval at the AGM

- **Monthly and annual Profit and Loss Comparison** report of current to previous year
- **Annual budget** for approval at the AGM with input from the Board

Carries out the following

- Ensures that all statements comply with the Societies Act
- In conjunction with Facilities Coordinator, prepares and maintains a current detailed list of Fixed Assets and Depreciation Schedule
- Prepares and maintains Year-end Closing Journal Entries and amended monthly recurring Journal Entries for input by Bookkeeper
- Establishes and monitors bank and investment accounts on behalf of the Society
- Assists with fundraising activities and prepares financial records
- Applies for GST Rebate twice yearly
- Prepares and submits the Society's Annual Report to CRA
- Ensures that the Society's commercial and Director's liability insurance is adequate and updated
- Serves as one of the bank-signing officers of the Society
- Prepares an audit package for review by an auditor for year-end
- Provides annual recommendations to the Board for a professional, familiar with General Accounting Practices, to assess the Society's Financial Records
- Chairs Wage and Job Review Committee

ADMINISTRATION

OFFICE MANAGER (PAID POSITION)

The Office Manager is responsible for administrative details including Amilia/Activity messenger, programming, finance, hybrid operations, and webmaster. Special Events are additional and wages and hours are subject to semi-annual review.

ADMINISTRATIVE

- Checks emails, monitors phone messages and mail and responds or forwards to the appropriate persons
- Distributes or mails payments
- Renews subscriptions – Zoom, Microsoft, Website Domain, Website plan
- Purchases & maintains office and classroom supplies
- Works with the Equipment Committee, maintains equipment, ensuring it is functioning correctly and recommends acquiring new equipment
- Files Annual Report to the BC Registry no later than 30 days after AGM, updating of Director's info and any changes to SLR's Bylaws
- Files hard copy and digital copy of minutes of board meetings as well as insurance, contracts, and correspondence documents
- Creates and maintains a file with SLR passwords
- Creates and maintains a building key registry and instruct key holders regarding alarm system and securing the back door
- Sends welcome emails to new members
- Answers questions from members and the public
- Secures a written agreement with service providers

AMILIA/ACTIVITY MANAGER

- Maintains member data base in both Amilia and Activity Messenger
- Creates online program in Amilia for registration
- Distributes class lists to presenters as required
- Updates presenters on class sizes
- Monitors waitlists and manages reminders re classes
- Sets up class reminders and Zoom links for distribution
- Creates monthly membership/course report for Board meetings
- Oversees and assists in the Registration process
- Creates and distributes updates for courses and other events throughout the term, via email
- Pays Messenger charges for new class creation and follow-up subscription

REGISTRAR/SCHEDULER

- Contacts past presenters with an invitation to present the following term
- Receives course submissions from presenters via website email and forwards to scheduler
- Enters course data into Amilia

PROGRAMS

- Creates course programs (reviewed and edited by volunteers)
- Provides final draft to Program Chair for board approval
- Obtains printing quote and forwards to Program Chair for board approval
- Organizes printing and distribution of programs via mail and email

FINANCE

- Forwards in-person class fees and financial reports to the bookkeeper
- Processes credits/refunds for course withdrawals/cancellations
- Reports all course credits to Treasurer at year-end
- Creates and distributes Donation Tax receipts
- Maintains prepayment Photocopying
- Prepares presenters' stipend sheets which include name and amount
- Purchases gift cards for guest speakers
- Digitally files monthly transactions for the Bookkeeper
- Collects outstanding fees

HYBRID/TECH OPERATION

- Ensures availability of equipment for Hybrid classes
- Ensures Zoom link is correct and is distributed to registrants
- Sets up equipment prior to the start of each class
- Tests the Hybrid connection, verifying both audio and visual work correctly
- Assists presenters with tech set-up and/or difficulties in classroom/auditorium

WEBMASTER

- Ensures that current and accurate information is uploaded to the website. This position requires a person with technical skills and experience
- Update current information on the website

BOOKKEEPER (PAID POSITION)

- Reports to Treasurer and works with Office Manager
- Receives and deposits all incoming cheques
- Prepares and issues all cheques for payment
- Prepares monthly statement
- Prints copies of monthly statements
- Maintains monthly accounting files

OFFICE ASSISTANTS (PAID POSITION)

Office assistants will provide back up for the Office Manager. They will receive an overview of all administrative tasks but to maintain consistency will be assigned their own area of responsibility.

ADMINISTRATION: FINANCES

FINANCE CHAIR: TREASURER

Equipment requirements

- In consultation with Facilities Chair, creates a report specifying all upgrades, repairs and replacement projects
- Fills out a Request for Proposals (RFP) outlining specific requirements for purchase or repair
- In conjunction with the Equipment Committee, interviews vendors, evaluates proposals and makes recommendations to the board.

GRANT OPPORTUNITIES

- Seeks approval from the Board re grant applications
- Creates an inventory of grant opportunities appropriate for a non-profit society
- Prepares grant application (either volunteer or paid)
- Liaises with Volunteer Chair regarding volunteer hours for grant applications

FUNDRAISING PROJECTS

- Works with appropriate Committee Chair to discuss possible fundraising projects
- Establishes a project committee with the appropriate chair to plan and coordinate approved initiatives
- Seeks approval from Board for project proposal, budget, etc.
- Monitors financial aspect of projects
- Monitors the following projects
 - Legacy Gift Giving program
 - Saturday movies
 - Nature Fare receipts

ADMINISTRATION: FACILITIES/EQUIPMENT CHAIR

The Equipment Chair and his/her committee are responsible for the management of all SLR equipment both on and offsite. The Committee works with other organizations when equipment is used in their facilities for SLR events and courses.

FACILITIES

- Meets with Boys' and Girls' Club of the Okanagan (BGCO) in November and March to review SLR's contract
- Liaises with OBGC re SLR facility repairs/improvement. The building and grounds are leased from the City of Kelowna and managed by BCGO. SLR is responsible to BGCO and must liaise with the City through BCGO
- Works with the Facilities Committee, the Board and OBGC on short- and long-term facility-related goals

EQUIPMENT

- Oversees Class Equipment and is responsible for all Assets/Equipment Inventory Management
- Liaises with Program Chair to clarify class schedule, equipment arrangement
- Works with Treasurer to determine funding needs and sources
- Collects and manages all Equipment Request forms (replacement/repair/training) for items over \$500
- Acquires quotes from three vendors where possible
- Manages the physical Inventory of SLR Equipment including computers
- Records all volunteer hours spent on Equipment projects when required

Technology Director Responsibilities

- Meet and work with office staff re technology issues and needs that may have been identified.
- Maintain tech equipment including security.
- Recruit, train and schedule volunteers to act as Zoom hosts for sessions offering a Zoom participation option.
- Oversee set-up/take-down of sound and projection systems for auditorium-based sessions.
- Submit report at monthly board meeting as needed.

PROGRAMMING

PROGRAM CHAIR

AS BOARD MEMBER

- Recruits members for programming committee
- Prepares monthly report for board meeting

PROGRAMMING

- Organizes and facilitates program committee meetings
- Reviews submissions and edits as needed, sends to presenter for final approval
- Oversees program scheduling including dates, times and room assignments completed by assigned office staff
- Distributes list of ongoing presenters to assigned office staff to contact via email re potential courses
- Volunteer to contact presenters who do not respond email
- Oversees program calendar prepared by assigned office staff
- Revises course schedule regarding cancellations or revisions

SCHEDULING

- Sends any omissions and errors to original caller for clarification
- Courses are scheduled and templates are sent to presenters for approval
- All templates are sent to volunteers to insert into the program
- The program is proofread and submitted to the Board for approval before printing

PRESENTERS & GUEST SPEAKERS

- Maintains list of active presenters and guest speakers
- Researches and recruits new presenters
- Schedules the auditorium with BGCO for guest speakers
- Organizes volunteers for registration day
- At presenter's orientation, provides informational packages and handbook prior to start of each semester
- Maintains list of classroom assistants to help presenters
- Taps into capacity of members as potential presenters
- Garners ideas and proposals for courses from Board Members, presenters, members and others.
- Submits annual budget for programming related expenses including stipends/honorariums
- Develops and maintains a record of volunteer hours and reports the information to the volunteer chair as required
- Is one of the signing officers for the Society
- Discusses future semester classes with presenters.
- Hosts presentation on SLR and its services to special interest groups

MEMBERSHIP

MEMBERSHIP CHAIR

The Chair encourages membership growth and oversees the management and support of SLR members

- Develops and implements communication strategies aimed at building relationships with members
- Participates in community/senior fairs to promote SLR
- Improves ongoing communication in conjunction with the Volunteer chair with those offline subject to being an identified need
- Maintains and updates social media, working with Facebook volunteer
- Prepares annual Christmas email blast thanking members for their participation and their volunteer efforts throughout the year (works with Community Relations chair and Office Manager)
- Sits on the nominating committee for recruitment of potential new directors
- Coordinates members' creations project (displays of work samples produced resulting from art classes)
- Reports monthly to the Board on membership fees, numbers and changes
- Seeks approval from the Board of Directors for the monthly additions of new members
- Chairs Honorary Membership committee to determine recipients for lifetime membership
 - Any member of the Society may nominate another member to become a Lifetime Member. These nominations must be in writing and give reasons of the nomination and should be addressed to the Board
 - Lifetime members may attend and vote at general meetings but are not required to pay membership fees
- Reviews annually Welcome Letter (for new memberships) with Office Manager
- Provides opportunity for members to purchase T-shirt/vests
- Works with Community Relations Chair to increase diversity in membership
- Informs Program Chair of potential presenters including young people and those with disabilities
- Increases accessibility and comfort. e.g. photo frame
- Encourage diversity on the Board and within the membership

MEMBERSHIP cont'd

NEW MEMBERS

The Membership Chair will play a vital role in ensuring new members feel welcomed and integrated into our community. This position involves tracking new member registrations, providing personalized support during their initial interactions, and fostering a sense of belonging through organized meet-and-greet events and follow up.

New Member Tracking

- Monitor and keep track of new members through Amilia registrations

Initial Welcome and Orientation

- Ensure new members are welcomed at their first class
- Offer a tour of the facilities and introduce them to key areas and personnel
- Ensure new members feel comfortable and informed about the community and classes

Feedback Collection

- Gather feedback from new members about their class experiences
- Identify areas of interest and additional classes they may want to join

New Member Integration Events

- Organize 'newcomers' coffee and muffin meet-and-greet events
- Facilitate introductions and interactions among new members to build a supportive community

Follow-Up and Retention

- Monitor new member participation and follow up if they quit after one class.
- Identify reasons for dissatisfaction and provide solutions or alternatives

Community Building

- Identify potential presenters or volunteers among new members
- Encourage and facilitate new members to get involved in various activities and roles within the organization

COMMUNITY RELATIONS

The Community Relations Chair oversees the support, partnerships and participation in community initiatives:

- Develops and nurtures relationships with Okanagan communities
- Develops and implements plans for raising community awareness and publicizing the Society, its services and programs
- 'Spreads' the word about SLR's services by writing and securing publication of information-based articles in various media platforms
- Obtains and attends invitations to perform guest speaker presentations to members of like-minded Okanagan groups and organizations
- Establishes and maintains connections with local media and advertising agencies
- Liaises with SLR photographer on photos for publication in print and online
- Participates in the distribution of posters, brochures, flyers etc.
- Oversees the volunteer administrator of two Facebook pages: the SLR page that keeps members updated on SLR events and activities and the Members page where members can communicate and share information with each other

VOLUNTEERS

VOLUNTEER CHAIR

- Develops and maintains a record of volunteers
- Maintains phone contact with, and updates, SLR members who don't have email addresses
- Develops and/or maintains a list of tasks for each designated volunteer group inclusive of registration, social, auditorium set-up, program committee, callers, program delivery, special interest groups and photography
- Develops a volunteer management plan that includes recruitment, job descriptions, coordination and recognition
- Liaises, in conjunction with Fund Development Chair, with Nature's Fare regarding collection of sales receipts
- Liaises with Office Manager to use Website and Amilia to recruit volunteers
- With other Directors, develops and maintains a system for tracking volunteer hours which are reported monthly to Volunteer Coordinator as required
- Acquires orientation packages for new volunteers outlining the tasks, expectations and responsibilities for each volunteer position as developed by the various committee chairs
- Organizes volunteers to help at the Registration table
- Liaises with other Directors re their need for volunteers and the availability of interested volunteers

SOCIAL ACTIVITIES

SOCIAL ACTIVITIES CHAIR

- Recruits SLR members to join the Social Committee and adds replacement members when needed, with the input of the Volunteer coordinator
- Reports to the Board and sends a list of committee members to the Volunteer Coordinator annually, after the SLR Annual General Meeting
- Attends Board meetings and provides light refreshments
- Arranges meetings of the Social Committee to plan all SLR social events and prepares and distributes meeting minutes to committee members
- Arranges presenters' luncheons and orientation meetings as advised by the Program Chairperson
- Organizes provision of refreshments for presentations hosted in the auditorium or other large venues
- Coordinates the organization of SLR social events throughout the year
- Monitors and maintains the beverage and related supplies used during programs and for coffee chats during the summer
- Monitors the inventory of equipment in the SLR Lounge and submits requests for replacement of items or addition of items as necessary, to the Facilities Coordinator if the cost exceeds \$500
- Submits a yearly budget to the Board for social events and coffee supplies
- Maintains a file of reports on events, including their costs
- Maintains files on expenses for the regular coffee supplies, including the amounts purchased, when they were purchased and where they were purchased
- Develops and maintains a record of volunteer hours and reports this data to the volunteer chair