

**WISE**

**Leadership Roles  
&  
Responsibilities**

**Academic Year 2020 - 2021**

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## INTRODUCTION

**“Fostering a culture of teamwork, acknowledgment, respect, inclusivity, transparency & participation.”**

This is a theme that is repeated throughout these documents & is a credo that is to be communicated by the WISE leadership to all members & embraced by every member of WISE.

1. An effort has been made to clarify the roles that volunteers play in their leadership roles at WISE, so that:
  - a) There is no ambiguity in their roles & responsibilities.
  - b) There are clear lines of authority.
  - c) The streamlining of processes is enhanced.
  - d) The membership is better informed, so that potential leadership candidates are identified & will volunteer.
  - e) The expectations of the salaried members of the WISE Leadership Team, as well as what WISE expects of them are clarified.
  - f) Developing an institutional memory will make the future hiring of personnel, a much easier task.
  - g) I will make the task of getting more people volunteering for leadership roles easier.
2. These are living documents & they will change when Information Technology advances or when circumstances so demand it.
3. The rollout will include the following people & the message will need to be repeated in a clear, consistent & unified manner by:
  - a) The Director and the Office Manager.
  - b) The Members of the Executive Committee.
  - c) The Committee Chairs.
  - d) The At-Large Members of the Council.
  - e) The Sub Committee & Group Coordinators.
  - f) The Communications Committee via the various tools at its disposal, including the Website.
4. The message will consist of the material in the document titled: “Leadership Roles & Responsibilities”.

## LEADERSHIP ROLES & RESPONSIBILITIES

### I. PRESIDENT.

**TERM:** Two years.

**DUTIES & RESPONSIBILITIES:**

1. Represents WISE within the Assumption University organization & works with the University President to fulfill the WISE mission.
2. Ensures that the WISE organization complies with the Policies of Assumption University.
3. Ensures that the WISE organization functions within the scope of its Bylaws & policies & fulfills its strategic imperatives.
4. Appoints the Committee Chairs, Group & Club Coordinators & ensures that their terms of office are in keeping with the WISE Bylaws.
5. Functions as Chair of the WISE Council & its Executive Committee.
6. Works with the Vice President, the Chairs of Committees & Coordinators of various Groups to help fulfill their Charters.
7. Attends meetings of the various Committees & Groups when possible & provides input.
8. Ensures that WISE is a transparent organization, and that all relevant information & data is available on the WISE Website.
9. Supports the WISE Director in fulfilling her/his responsibilities.
10. Communicates with & acts as a spokesperson to WISE members & to the community at large.
11. Fosters a culture of teamwork, respect, acknowledgement, inclusivity, transparency & participation.

## II. VICE PRESIDENT.

**TERM:** Two years with assumption of duties of the President after two years.

### **DUTIES & RESPONSIBILITIES:**

1. In the absence of the WISE President, assumes the responsibilities accorded to the President of WISE.
2. Serves as a member of the Wise Council & its Executive Committee.
3. Works with the WISE President towards eventually assuming the role of the WISE President after two years of service in the WISE Council.
4. Supports the WISE President & assumes responsibility for special projects as they become necessary.
5. Works with the President, the Director & the Chairs of Committees & Coordinators of various Groups to help fulfill their responsibilities.
6. Attends meetings of the various Committees, Groups & Clubs, when possible & provides input.
7. Fosters a culture of teamwork, respect, acknowledgement, inclusivity, transparency & participation.

## III. TREASURER.

**TERM:** Two years with a possible extension for two years.

### **DUTIES & RESPONSIBILITIES:**

1. Serves as a member of the WISE Council & its Executive Committee.
2. The Treasurer is also the Chair of the Finance Committee.
3. Works with the WISE Director & prepares & monitors the annual budget.
4. Reviews the monthly and annual financial statements & submits them to the Council.
5. Fosters a culture of teamwork, respect, acknowledgement, inclusivity, transparency & participation.

#### IV. SECRETARY.

**TERM:** Two years with a possible extension for two years.

##### **DUTIES & RESPONSIBILITIES:**

1. Serves as a member of the WISE Council & its Executive Committee.
2. Records the minutes of the WISE Council and the Executive Committee, & forwards them to the President in a timely fashion.
3. Fosters a culture of teamwork, respect, acknowledgement, inclusivity, transparency & participation.

#### V. MEMBERS OF THE COUNCIL (COMMITTEE CHAIRS).

##### **AT LARGE MEMBERS OF THE COUNCIL.**

**TERM:** Chairs: Two years, with a possible final extension of two years.  
At-Large Members: Two years.

##### **DUTIES & RESPONSIBILITIES:**

1. The Council consists of:
  - a) President
  - b) Vice President
  - c) Treasurer
  - d) Secretary
  - e) Director
  - f) The Committee Chairs
  - g) The At-Large members
  - h) The Past Presidents
2. All the members participate in all activities of the Council, as detailed in the Committee Charters document.

3. The Committee Chairs:
  - a) Carry out their responsibilities as Committee Chairs.
  - b) Provide to the President, a summary of their Committee activities in a timely manner.
4. The Council members serve as:
  - a) Spokespersons of WISE & communicate the spirit of the WISE message to members and non-members alike.
  - b) Representatives of the members to the Council.
  - c) Actively participate in the recruitment of volunteers who serve in leadership roles in WISE.
  - d) Carry out special assignments on behalf of the Council and the President.
5. Foster a culture of teamwork, respect, acknowledgement, inclusivity, transparency & participation.

**VI. CHAIR OF A COMMITTEE & SUB-COMMITTEE.  
COORDINATOR OF A GROUP OR CLUB.**

**TERM:** Two years with a possible final extension of two years.

**DUTIES & REPONSIBILITIES:**

1. Participates in all the activities of the WISE Council.
2. Performs all the duties of the individual Committees, Groups & Clubs.
3. Provides reports, including the Annual Report, requested by the President, in a timely fashion.
4. Fosters a culture of teamwork, respect, acknowledgement, inclusivity, transparency & participation.

**VII. VICE CHAIR OF A COMMITTEE.  
ASSISTANT COORDINATOR OF A GROUP & CLUB.**

**TERM:** Two years with a possible final extension for two years.

**DUTIES & RESPONSIBILITIES:**

1. In the absence of the Chair, Subcommittee, Group & Club, assume her/his role.
2. Be prepared to assume the role of the Chair of the Committee or the Coordinator of the Group & Club when her/his term expires.
3. Fosters a culture of teamwork, respect, acknowledgement, inclusivity, transparency & participation.

**VIII. RECORDER: COMMITTEE OF A GROUP & CLUB.**

**TERM:** Two years with a possible final extension for two years.

**DUTIES & RESPONSIBILITIES:**

1. Records the minutes of the Committee meetings, & forwards them to the Committee Chair in a timely fashion.
2. Fosters a culture of teamwork, respect, acknowledgement, inclusivity, transparency & participation.



## **IX. DIRECTOR, WISE.**

### **QUALIFICATIONS:**

1. Ability to lead & work with a nonprofit lifelong learning program for older learners run by an all-volunteer Council and Committees, as an official program of Assumption University.
2. Advanced leadership, organizational & communication skills, including creative problem solving and team building.
3. Demonstrated educational, financial & information technology skills.

### **REPORTS TO:**

1. The WISE Council through its President.
2. The Dean, School of Graduate & Professional Studies, Assumption University.

### **DIRECT REPORTS:**

The Office Manager, WISE.

### **DUTIES AND RESPONSIBILITIES:**

1. Serves as a liaison between WISE members & the staff, faculty & students of Assumption University; ensures that WISE functions within the parameters set forth in the agreement between the two entities, respectful of the mission of Assumption University.
2. Supervises the Office Manager in conduct of her/his assigned functions in support of WISE.
3. Facilitates the procurement of classroom space.
4. Collaborates with WISE Officers, Committee Chairs, Group Coordinators & Assumption University personnel.
5. Assumes responsibility for all operations at WISE & collaborates with all Committees, Groups & Clubs which organize WISE activities and programs.
6. Works with other ad-hoc Committees & Groups as necessary.
7. Works with the Treasurer to fulfill responsibilities for all financial operations at WISE, including:
  - a) Preparation of the annual budget, the monthly & annual financial reports.
  - b) Supports audits of financial reports when requested.

8. Works with designated individuals to develop, coordinate & execute fundraising efforts.
9. In collaboration with the Technology Advisor & the Office Manager:
  - a) Maintains & updates the WISE repository of data to ensure continuity & institutional memory.
  - b) Maintain & update all content on the Website.
  - c) Ensures that all data is provided in a timely fashion to support the Wise Metrics and Dashboard.
10. Attends meetings of the WISE Council, the Executive Committee & selected Committee meetings and provide reports to them as needed.
11. Undertakes outreach efforts to the Greater Worcester community, with particular efforts to increase membership.
12. Meets regularly with the Dean of Graduate & Professional Studies & other individuals as necessary.
13. Fosters interdisciplinary learning opportunities through connecting WISE activities with Assumption University faculty, students, & courses.
14. Assists in the development & implementation of the WISE strategic plan which is approved by the Council.
15. Develops annual goals & provides yearly progress reports to the Council.
16. Undergoes an annual performance evaluation by the Council.
17. Fosters a culture of teamwork, participation, respect, acknowledgement, inclusivity & transparency.

## **X. OFFICE MANAGER, WISE.**

### **QUALIFICATIONS:**

1. Expertise with office and web-based software and applications including Word, Excel, PowerPoint and Outlook.
2. Superior verbal & written communication skills.
3. Strong skills using registration & member database programs as may be selected by WISE Leadership and/or Technical Advisor, as well as those utilized by Assumption University for room reservations, financial management and catering services.
4. Demonstrated educational, financial & information technology skills.
5. Comfort and ability in working with the population of older learners.

**REPORTS TO:** Director, WISE

### **DUTIES & RESPONSIBILITIES:**

1. Provides support to the Director, WISE, in discharging her/his duties.
2. Supports the members of the WISE Council, Committee Chairs, Group Coordinators & SIG leaders.
3. Manages & maintains the WISE website in collaboration with the Director and the Technology Advisor, which:
  - a) Manages the membership database and prepares reports as needed.
  - b) Posts and archives the minutes of the Council, Committee & Group meetings on the website.
  - c) Prepares all WISE Course Catalogs for print and website which is based on course materials provided by the Curriculum Committee using a standard formatting template. Posts and manages the Course Catalog on the WISE website.
  - d) Displays information necessary to update the WISE Metrics, Dashboard & the Website.
  - e) Collaborate with Director and Technology Advisor to streamline processes.
  - f) Maintains & updates the WISE repository of data to ensure continuity & institutional memory, in collaboration with the Director and in accordance with Assumption University policy on records retention.

4. Manages & maintains financial information regarding:
  - a) Processes cash, checks and credit card transactions of member revenue for membership fees, special event payments, excursions and donations.
  - b) Prepares and initiates check requests through the University portal for reimbursements and payments to Instructors, vendors, speakers and members.
  - c) Coordinates parking permits for WISE members.
5. Academic Support:
  - a) Prepare a course catalog three times a year including the summer course catalog.
  - b) Collaborates with Director, AU staff, Curriculum Chair to secure appropriate spaces for classes & meetings on and off campus.
  - c) Assists the Class Assistant Coordinator in obtaining the documents necessary to prepare the Class Assistant packets.
  - d) Distributes course evaluation letters to Instructors.
  - e) Provide support & technical training to Instructors as needed.
6. Membership:
  - a) Create Internal outreach goals to increase membership and enlist Student Assistant or volunteers to assist with extensive phone call and email campaigns.
  - b) Collaborate with Director on developing marketing materials and external outreach plan to reach membership goals.
  - c) Manages WISE inventory of marketing materials and office supplies.
  - d) Coordinate marketing events and distribution of materials to promote program.
  - e) Attend WISE, AU and community events to promote program.
  - f) Handle complaints and resolve issues with member access to classes or enrollment, refund requests and other issues in order to provide high quality member experience.
  - g) Handle phone & e-mail inquiries, requests from existing & potential members & Instructors, including sending them information or providing technical support and training as necessary.
7. Student Workers

- a) Recruit, hire (with Director approval), train and manage administrative summer staff and work-study students. Signs contracts & timesheets, gives feedback to the AU administrative staff on work performance.
- 8. Handles special projects as needed.
- 9. Prepares goals and undergoes an annual evaluation by the Director & the Council.
- 10. Fosters a culture of teamwork, respect, acknowledgement, inclusivity, transparency & participation.

<b>WISE LEADERSHIP ROLES &amp; RESPONSIBILITIES</b>	
<b>Approved by the WISE Council</b>	
Approved	October 22, 2020
Supersedes	November 13, 2019