

LLI Policy and Operations Manual

As of January, 2024

Note: Policies are identified by the month and year when they were enacted and/or reviewed by the LLI Council.

FINANCES:

FIN 11/22A. LLI Council establishes need-based scholarships to LLI members for partial or full coverage of annual membership fees. The amount of said scholarships shall be determined annually by Council based on the recommendation of the Finance committee. New and renewing members who wish to apply for said scholarships shall petition the Council President, in writing. The President shall be authorized and empowered to award such scholarships, at his or her discretion, and the payment of such scholarship shall be made directly to LLI on behalf of the member(s). (*Was FIN 4/21, revised to FIN 11/22A in November '22*) Reviewing in February '24

FIN 11/22B. Any cash reserve requirements for LLI accounts shall be determined annually by Council based on the recommendation of the Finance Committee. (*Was FIN 11/13, revised to FIN 11/22B in November '22*)

FIN 12/22. LLI shall contribute to the LLI program known as "Dean Stuart Stritzler - Levine Seniors-to-Seniors Scholarships" to support senior students' projects. The amount of the contribution shall be determined annually by Council based on the recommendation of the Finance committee. (*Was FIN 05/15-B, revised to FIN December, 22*) **Reviewed in January '24

FIN 12/21. In the fall semester, members may withdraw from LLI membership and request a full refund of the annual membership fee by notifying the President, in writing, by the end of the second week of classes. **Reviewed in January '24

FIN 11/20. LLI at Bard is immensely grateful to Bard College for its generous support. LLI, in turn, donates generously to the college, while maintaining fiscal responsibility for our organization. The LLI Finance Committee initiates the proposals for donations each year, in consultation with Bard administration, and makes recommendations to LLI Council for approval. **Reviewed in August '23

ORGANIZATION:

ORG 12/12. Former LLI members are not given priority for membership when reapplying for membership. **Reviewed in September '23

ORG 04/17. The LLI Council meets on the third Monday of each month, unless that is a national holiday; in that case, the Council meets on the following day. **Reviewed in November '23

ORG 06/22. Admission to LLI is by lottery with three exceptions: applicants who were presenters in the previous academic year, applicants who are scheduled to present a course in the upcoming academic year, and applicants who have critical skills needed to run LLI and who qualify for and are committed to a specific task or priority. (rewritten June, 2022) **Reviewed in December '22 *After some discussion, Council agreed that spouses will not receive special consideration for admission. Given the crowding issues, we may need to reconsider the maximum number of LLI members. The policy stands.*

ORG 03/19-A. The LLI Council will determine membership cap annually in April. **Reviewed in January '23

ORG 2/22A. In the event of bad weather, LLI follows decisions made by the Red Hook Central School District. When RHCS D cancels classes: LLI will also cancel its classes and all other programs. When RHCS D delays the start of classes: 1) LLI first-period classes will be canceled; 2) second-period classes will begin, as usual, at 10:10 a.m.; 3) LLI WinterFest programs will be held as usual. For information: RHCS D: redhookcentralschools.org or cancellations.com, or call: 845 758-2241. All Zoom classes will be held as scheduled, regardless of school closures. **Reviewed in January '23

ORG 2/22B. Bard LLI uses Google Workspace for Education for all committees and team communications and records. G Suite tools allow collaboration and coordination among and between committees and teams.

G Suite includes Shared Drives with appropriate permissions, Google Docs, Google Sheets, Google Slides, and other G Suite applications.

Reference documents, training, and coaching are provided to all members who need to access G Suite files. **Reviewed in December '23

ORG 9/21. LLI classes on national holidays will be held unless the Bard College class schedule observes that holiday. Observance of religious holidays that coincide with LLI classes is at the discretion of the class presenter. **Reviewed in March '23

ORG 12/21. LLI recognizes the importance of making the public aware of our organization and supporting initiatives or events that are in line with our mission statement through purchasing and publishing advertisements.

Accordingly, any request from an LLI committee to place an advertisement in any form of media, including but not limited to print or online, shall be in accordance with the following:

1. A timely written request, including the proposed format and language, shall be submitted to the Planning & Evaluation Committee for discussion and recommendation to Council for final approval.
2. Advertisements should include reference to LLI by name and use the current logo.
3. Advertisements must refer to the Lifetime Learning Institute at Bard College and include a link to the website. **Reviewed in August '22 Reviewing in February '24

ORG 4/22. The opinions and views expressed in the LLI Newsletter are those of the author(s). They do not purport to reflect the opinions or views of LLI or its members. In addition, any link to a website or content belonging to or originating from third parties are not investigated, monitored or checked for accuracy, adequacy, validity, reliability or completeness by LLI, nor does LLI accept any responsibility for such content. **Reviewed in March '23

ORG 4/23. LLI has no paid staff or presenters and depends entirely on the efforts and commitment of our volunteers. The Council at LLI strongly believes in creating and maintaining safe spaces for our members and visitors to participate in our courses and other activities. Accordingly, rude or disrespectful behavior will not be tolerated. Members who believe they were treated rudely or disrespectfully are encouraged to contact the president or a member of Council, in writing, and an appropriate inquiry will be made. If the member who is alleged to have been rude or disrespectful is unwilling to remedy the situation or engages in another instance of rude or disrespectful behavior, Council reserves the right to terminate that member's membership or not renew that member's membership, whichever is appropriate given the circumstances. **Adopted in April '23

ORG 10/23. Members and guests are expected to follow LLI's policies. If a member or guest fails to follow any of these policies and upon a written complaint delivered to the President, the President shall give notice of the complaint to the member or guest and Council. As soon as practicable, Council shall discuss the complaint and decide on the appropriate course of action, which within Council's sole discretion, by majority vote, may include a written warning, a suspension of a member's participation in any committee or team or the prohibition of a member's or guest's opportunity to present, or termination of membership. The President shall notify the member or guest of the decision of Council. **Adopted in October '23

PROGRAM:

PROG 01/13-A. Presenters may promote to their class members. Presenters may provide, to those attending their classes, a list of their upcoming scheduled events, shows, etc. Additionally, class members may sign up to be placed on the presenter's list to receive emails regarding events, shows, etc. **Reviewed in September '23

PROG 09/22. LLI will publicize only events directly related to LLI or Bard. LLI will not advertise other events or organizations, including those sponsored by members or

presenters. Death notices of LLI members will be briefly mentioned in the newsletter under the heading “In Memoriam,” with links to the member’s obituary if available.

Exceptions may be made when a timely written request for approval to disseminate information about a program, event, or course is submitted to P and E for discussion and recommendation to Council for final approval. In situations where time is of the essence P&E or Council, whichever meets next on the calendar, can take an email vote for approval of the request. P&E may also make the recommendation to Council in lieu of any other committee or team. Draft language for the proposed communication shall be included in the request. The purpose of this exception is to streamline the approval process to publicize events for the benefit of LLI members. **Reviewed & revised in October ‘23

PROG 01/15. The current Bard College Copyright Policy is adopted as Council policy. This policy can be found as an addendum to the Policy Manual. **Reviewed in November ‘23

PROG 11/17. At registration, LLI members give their permission for their photo or video image to be used in LLI publications and communications. **Reviewed in October ‘23

PROG 07/20. Presenters may bring one guest to attend their class each week of their courses. For online classes, a presenter may submit a maximum of three guest email addresses to be sent the link to the requested classes. **Reviewed in October ‘22 & **Reviewed in April ‘23

PROG 04/22: The opinions and views expressed in the LLI newsletter are those of the author(s). They do not purport to reflect the opinions or views of LLI or its members. In addition, any link to a website or content belonging to or originating from third parties are not investigated, monitored or checked for accuracy, adequacy, validity, reliability or completeness by LLI, nor does LLI accept any responsibility for such content. **Reviewed in April ‘23

PROG 05/18-B. LLI presenters are volunteers from LLI’s membership, the community, and Bard College faculty. LLI does not offer honorariums. **Reviewed in April ‘23 Robert will be drafting a new policy re: tribal orgs affiliated w/Native-American presenters

PROG 10/18. LLI members who volunteer and therefore have access to our database of membership emails, addresses, and telephone numbers may use this information only for their assigned volunteer needs, and not for any other purposes. **Reviewed in April ‘23

PROG 05/19. Video and/or audio recording must be approved by the Council and the Presenter. Requests must include the reasons for recording, and any copyrighted material must be used in accordance with the copyright policy of Bard College. Any

approved photography, video, or audio recording must be done as unobtrusively as possible. **Reviewed in December '23

Bard's Copyright Policy

Introduction

LLI will take appropriate measures to ensure that its members and presenters are aware of copyright laws, regulations and agreements and can act responsibly as they use information that is owned by others in the course of teaching, learning, research, or administration of LLI.

Stevenson Library Copyright Policy

Since LLI is directly affiliated with Bard College, we have adopted the Stevenson Library Bard College Policy, in particular, the Fair Use provisions of Section 107 of the 1976 U.S. Copyright Act, as detailed in the Bard College Student Handbook:.

<http://www.bard.edu/about/disclosures/>

The Bard computer and digital policy is available [here](#).

The Stevenson Library Reserves Copyright Policy “supports and advances the Constitutional principle that the fundamental purpose of copyright is to promote the progress of science and the useful arts through broad dissemination of information in a manner consistent with current copyright law.”

Fair Use

Section 107 Fair Use

Section 107 contains a list of the various purposes for which the reproduction of a particular work may be considered fair, such as criticism, comment, news reporting, teaching (including multiple copies for classroom use), scholarship, and research. In determining whether the use made of a work in any particular case is fair use, the factors to be considered are:

1. The purpose and character of the use, including whether such use is of a commercial nature or is for nonprofit educational purposes;

2. The nature of the copyrighted work;
3. The amount and substantiality of the portion used in relation to the copyrighted work as a whole; and
4. The effect of the use upon the potential market for or value of the copyrighted work.

The distinction between fair use and infringement may be unclear and not easily defined. There is no specific number of words, lines, or notes that may safely be taken without permission. Acknowledging the source of the copyrighted material does not substitute for obtaining permission.

General Rules for Fair Use

- Single chapters;
- Single articles from a journal issue;
- Several charts, graphs, or illustrations;
- Other similarly small parts of a work.

Guidelines and Procedures to Implement LLI Copyright Policy

To ensure that all reasonable efforts to be in compliance with copyright law are made, it is necessary that a cooperative effort is put forth among producers, class managers, and presenters, beginning with the course preparation and throughout the semester. Therefore, it is recommended that the following guidelines and procedures be followed to implement the LLI Copyright Policy.

- Presenter plans course content including materials completes “Fair Use Checklist” and shares results with the producer. [Link to Columbia University Fair Use Checklist](#).
- If needed, the presenter secures permission for use from the copyright holder.
- If the readings or media are publicly available online, the presenter will share the website address with class members so they can print out their own copy or access in class via a portable device.
- Presenters will direct students to readings that are available online both on and off-campus via a Bard Library database subscription.

- Students may be directed to purchase printed materials Books and Course Packs be stocked at the Bard Bookstore by contacting Mary Meyer.
- Presenters may place books or other print copies containing the readings on reserve (physically) in the Stevenson Library.
- Students may borrow books from local public libraries.

LLI Community Copyright Compliance

Finally, the entire LLI community shall be educated in the area of copyright compliance.

- Curriculum Committee members and producers must be mindful of copyright law when they are recruiting a potential presenter.
- When planning their course content, presenters should receive guidance on how to ask for permission to use copyrighted works.
- Class Managers must be mindful of copyright law if requested to make copies of curriculum materials.
- Students should not expect presenters to provide multiple copies of materials that are protected by copyright. A newsletter article directed towards raising awareness of our members will be published.
- At Orientation, LLI copyright policy will be placed in packets. Time will be allocated to talk about Fair Use with the whole group and answer any questions.
- A presentation by Jeff Katz (or appropriate training CD) for Curriculum and Classroom Support will be scheduled.

More Information

For more information, refer to the following websites:

- The University of Minnesota Libraries - Copyright Information and Resources at <https://www.lib.umn.edu/copyright/sharing-course-materials>
- The University of Texas - Copyright Crash Course at <http://guides.lib.utexas.edu/copyright>
- Columbia University at <https://copyright.columbia.edu/>

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