



**M** UNIVERSITY OF MICHIGAN

# OLLI MEMBER HANDBOOK

OSHER LIFELONG LEARNING INSTITUTE  
WHERE LEARNING NEVER RETIRES.

# WELCOME

**Welcome to Osher Lifelong Learning Institute at the University of Michigan!** *Our motto: OLLI, Where Learning Never Retires*

As a member you will have the opportunity to:

- Participate in study groups and shared interest groups.
- Attend lectures and social events.
- Make new friends.
- Volunteer with interesting and creative committees to help develop programming.
- Have access to special member benefits.
- Join a community of lifelong learners.

## Our History

The Osher Lifelong Learning Institute at the University of Michigan (OLLI-UM) evolved from a program called Learning in Retirement, which was established in 1987 by Turner Geriatric Clinic volunteers at the University of Michigan. The successes of the Learning in Retirement program gained recognition from the Bernard Osher Foundation in the form of substantial grants to enhance and expand programming.

In 2012, OLLI-UM became one of 125 OLLIs across the United States. OLLI at the University of Michigan has a \$2,000,000 endowment from the Osher Foundation. We must maintain a minimum of 1,000 members per the endowment. That endowment is managed by the University of Michigan. OLLI receives an annual distribution of 5% of the endowment, which accounts for approximately 30% of our revenue. Additionally, our OLLI receives in-kind support from U of M as part of the agreement including our location in the Turner Senior Resource Center, classroom space, and additional university services. OLLI-UM does not receive any additional financial support from the university. We thrive on our membership fees, program revenues, advertising, donations and sponsorships from our members and volunteers along with grant funding and special events.

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# OUR MISSION



## OUR MISSION

OLLI fosters lifelong learning designed by volunteers for older adults seeking stimulating discussion, fellowship and wisdom.

## OUR VISION

OLLI will provide learning experiences that members promote to their neighbors and friends, presenters are eager to share, volunteers are excited to plan, and donors are proud to support.

*“Who knew I would like abstract art! I learned that in an OLLI class. When I first joined someone told me I’d make a lot of new friends. I thought I didn’t need new friends but it turns out I did and I’ve made some great ones.”*

*- Kathleen Singer*

## CORE VALUES

OLLI embraces U-M's values that were developed by the larger university community:

- **Integrity.** We act with honesty and take responsibility for our actions.
- **Respect.** We act in a way that acknowledges the humanity and contributions of each individual.
- **Inclusion.** We create an atmosphere where all can participate, are invited to contribute, and have a sense of belonging.
- **Equity.** We create conditions that provide everyone an opportunity to thrive.
- **Diversity.** We welcome, acknowledge and appreciate our similarities and differences.
- **Innovation.** We promote creativity and curiosity to tackle challenges and inspire new ideas.

*Additionally, OLLI Values*

- **Collaboration.** We plan and execute in a collaborative partnership among OLLI staff, member volunteers, U-M representatives, and the greater community.



## THE OLLI WAY

As members of OLLI-UM, we value free expression of ideas. In doing so, we agree to abide by these guidelines.

1. I will be respectful of another's point of view.
2. I will demonstrate through words and actions that each colleague is a person of value to be respected.
3. I will be accountable for my words and actions.
4. I will be an ally, I will respond, and I will act with and for others in pursuit of an organization where inclusion is valued.

# OLLI TODAY

**OLLI is a volunteer-centered membership organization that offers programs for older adults, designed by older adults.**

It capitalizes on the skills, knowledge, and experience of dedicated older volunteers who actively plan and implement the learning programs for their peers. OLLI-UM is committed to challenging minds and stimulating the spirit to maintain healthy bodies.

OLLI operates as a collaboration between volunteers and staff. Volunteers share their passions and expertise to create amazing programming. The OLLI staff work with volunteers to secure the logistics, marketing and planning to bring the vision into reality.

*"I just continue to be in disbelief about the amount of fun ideas and new learning that are such gifts from the varied and wise perspectives of this wonderful gathering of "elders." - Barb Cheram*

# MEMBERSHIP

OLLI is a membership program, however we offer programming to non-members as well. Members must be 50 years of age or older. You only need to have a desire to learn as there are no educational requirements. Members come from a variety of educational and social backgrounds, bringing life experiences, enthusiasm, and a desire to participate and learn. OLLI membership is designed to appeal to retired, semi-retired individuals, and individuals still working. Memberships must be renewed annually to access programming and member benefits. All memberships are based on a fiscal year beginning September 1 to August 31. Our OLLI must maintain a membership minimum of 1,000 members annually.

## RIGHTS

1. To participate in all activities of OLLI, subject to payment of any specific fees and enrollment limits.
2. To recommend members to the Nominating Committee that considers persons to fill officer and at-large Leadership Council positions.
3. To participate in the annual member meeting.
4. To review and agree to the slate of nominees for Leadership Council officers and at-large members.

## RESPONSIBILITIES

1. To treat alternative points of view with courtesy and respect and to support civil dialogue in all cases. Consensus on a single point of view is not expected. In this context, there will be disagreements; but member behavior in these cases cannot be allowed to become disrespectful or caustic.
2. To refrain from using classes and activities to promote products or services or to generate client lists.
3. To refrain from using classes and activities to promote political positions or candidates. (OLLI shall not support or oppose any political party, candidate, or political issue).



# ANNUAL MEETING OF MEMBERS

The annual meeting is usually held in May. Notice of the meeting will be made at least 30-days prior to the date of the meeting.

## MEMBERSHIP OPTIONS

### All-inclusive Membership - \$300 per year

The all-inclusive membership includes all of the OLLI-UM programming, lectures and/or lecture series, study groups, Shared Interest Groups (SIGs), OLLI Out of Town virtual programs, Evenings with OLLI, Diversity Equity and Inclusion (DEI) special programming, OLLI Reads, and other events throughout the year. The exception is OLLI Out of Town in-person trips. **Members must register for each event in which they'd like to participate.** There are no priorities for participation in any program with an all-inclusive membership. A lottery is used for programs that have size requirements. OLLI Out of Town in-person travel only is not included and you must register and pay separately for these programs.

### Enhanced Membership - \$100 per year

The enhanced membership provides a discount of \$5 per lecture, study group, or Shared Interest Group (SIGs), OLLI Out of Town virtual programs, Evenings with OLLI, Diversity Equity and Inclusion (DEI) special programming, OLLI Reads, and other events throughout the year. Lecture credit is a maximum of \$50. Only OLLI Out of Town in person travel is not included. You must register for each in person travel event. There are no discounts for in person travel.

### Basic Membership - \$35 per year

The basic membership allows members to select any program and purchase their events ala carte for the listed costs. No discounts are included in this level of membership.

### Scholarship Membership - \$0 per year

Membership fee is waived to be inclusive to anyone 50+ who wishes to be a lifelong learner. Scholarship Membership operates on the honor system.



## **PROGRAM REGISTRATION**

All programs are offered in an academic year format: Fall and Winter/Spring. The OLLI program catalogs are mailed, and also are available online. Registration opens in advance of the fall and the winter/spring terms to sign up for programs. If registration is over subscribed (exceeds class capacity) for a program, a lottery is held to ensure program access is fair and equitable.

## **ADDITIONAL MEMBERSHIP BENEFITS**

- All OLLI members have access to more than 250 videos from our video catalog from 2016 to present. There is a nominal cost for videos that are not a part of your paid programming. This benefit is only available to OLLI members.
- Any OLLI member can become a volunteer. You can volunteer for a single activity, become a member of a committee, lead a study group, take a leadership role, chair a committee or become a Member-At-Large on the OLLI Advisory Leadership Council.
- There are two major free events, our Fall Kickoff in September, and our Winter Open House in January. The events are held in the Morris Lawrence Building at Washtenaw Community College and include refreshments and activities.
- As one of the four community programs with the Michigan Medicine Community Programs, we also receive advance notice and access to other services and programs serving older adults. The other community programs include the Turner Senior Wellness Program (TSWP), Silver Club Memory Program and the Turner African American Services Council (TAASC).
- OLLI volunteers are recognized annually at the Michigan Medicine Geriatrics Community Program Volunteer Appreciation Luncheon in June.
- The Weekly e-newsletters are sent every Friday with updates or changes to programming and highlights for the upcoming week.
- Many members participate in our signature fundraiser, Big Hearts for Seniors, that takes place annually in May. A portion of the proceeds goes to OLLI.
- Access to the resources of our OLLI Community Partners.

## OLLI COMMUNITY PARTNERS

The community partners work with OLLI to offer exclusive benefits to OLLI members. The community partners attend OLLI's Fall Kickoff and Winter Open House to promote their programs and share opportunities. OLLI continually strives to add more community partners and benefits to the OLLI membership. Please contact us if you have ideas of potential new community partners!

1. **University of Michigan Museum of Art:** <https://umma.umich.edu/>

UMMA offers programs that cater to a range of interests--from exhibition-related lectures to lively musical concerts. OLLI members gain special access to select UMMA events.

2. **The Health & Fitness Center at Washtenaw Community College:**

<https://www.wccfitness.org/>

The Health & Fitness Center includes an indoor track, two salt-water pools, cardio and strength training equipment, free weight area, saunas, steam rooms, whirlpools and locker room amenities. The Health & Fitness Center offers OLLI members a free pass to visit and utilize their fitness facilities.

3. **Ann Arbor District Library:** <https://aadl.org/>

The library has many physical items (books, movies, CDs, musical instruments, board games, art prints, telescopes) and digital offerings (ebooks, audiobooks, streaming music and movies, online newspaper subscriptions). The Washtenaw Library for the Blind and Print Disabled (WLBPD) is a service intended for the blind and print disabled, where you can request a multitude of audio books, magazines, and large print materials to be delivered by mail to you at no cost. There is also the Homebound service where, if you qualify, you can receive materials at no cost.

4. **Michigan Theater:** <https://michtheater.org/>

The Michigan Theater is a movie palace near the Central Campus of the University of Michigan. It shows independent films and stage productions and hosts musical concerts. The State Theatre, down the street, is an Art-Deco style cinema, with four screens that play first-run and repertory films.

5. **Washtenaw Community College - Emeritus Scholarship:**

<https://www.wccnet.edu/afford/financial-aid/scholarships/emeritus.php>

The Emeritus Scholarships are specifically designed to provide educational opportunities for individuals who are residents of Washtenaw County and are aged 65 years and older. The scholarship covers tuition expenses for non-credit classes and credit courses.

6. **Ann Arbor Civic Theatre:** <https://www.a2ct.org/>

Ann Arbor Civic Theatre was established as a non-profit community theater in 1929. A2CT exists to offer opportunities for the members of the community to participate in all aspects of theater.

# ORGANIZATIONAL MEMBERSHIP

Organizational memberships are geared toward senior centers and senior living facilities. This type of membership allows senior living facilities and senior centers to take advantage of OLLI programming for their residents. This membership allows access to all our virtual programming (including our video catalog). Some in-person programming is included in the enhanced and multiple organizational membership categories, or as an ala carte option. Scholarships are available.

## Virtual OLLI programming includes:

- Alfred Gourdji Distinguished Lectures Series - AGDLS (second Tuesday of the month)
- Thursday Lectures Series – TLS (most Thursdays)
- OLLI Out of Town (OOT) virtual programming
- Special OLLI virtual programming
- Attendance at OLLI Membership activities (fall kickoff, winter open house and summer picnic, volunteer recognition)

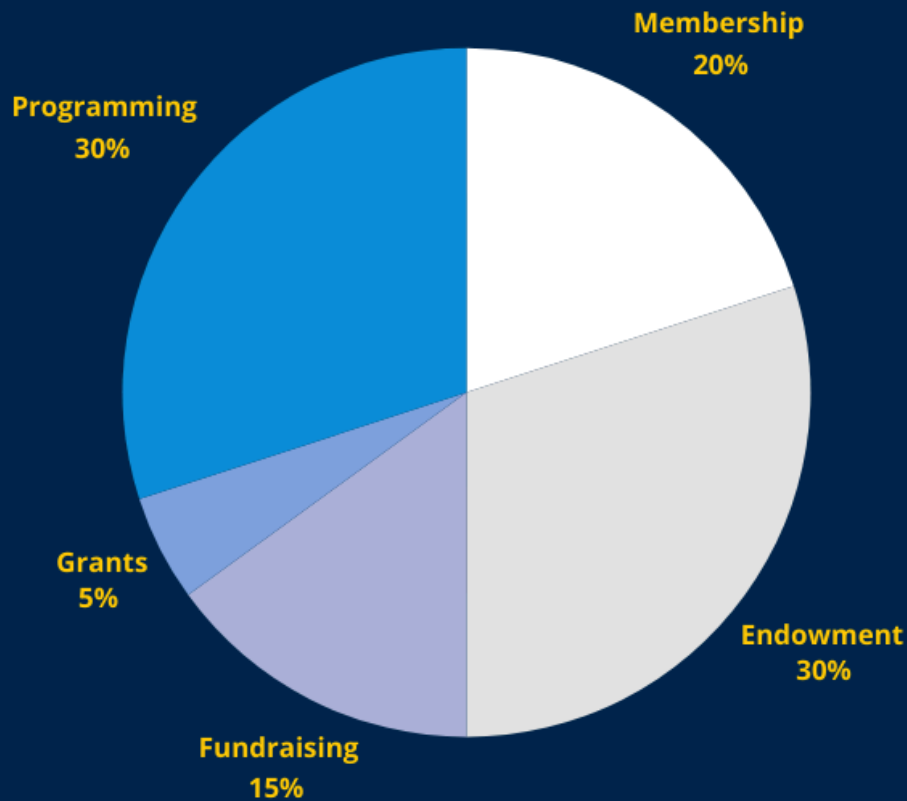
### Standard Org. Membership (one location)- \$1500

### Enhanced Org. Membership (one location)- \$2000

- Includes in-person attendance at DLS and TLS
- Includes in-person attendance at Evenings with OLLI (EWO)

### Multiple Org. Membership (multiple locations)- \$3000

- Includes in-person attendance at DLS and TLS
- Includes in-person attendance at Evenings with OLLI (EWO)



## OLLI Financials

### MEMBERSHIP

OLLI-UM must maintain a minimum of 1,000 members annually. We have individual memberships and organizational memberships (senior living communities). Our membership revenue is approximately 20% of our revenue.

### GRANTS

Grants and corporate sponsorships for significant OLLI programming and the OLLI fall, winter, and spring catalog account for roughly 5% of our total revenue.

### ENDOWMENT

OLLI-UM receives an annual distribution that contributes approximately 30% of our revenue annually.

### FUNDRAISING

OLLI fundraising relies on donations from members and friends, supporting operations or the OLLI Friends Endowment. Sponsorships and catalog advertising also generate revenue. Big Hearts for Seniors, our signature event, benefits OLLI and five other Geriatric Community Programs. Development and fundraising account for about 15% of our revenue.

### PROGRAMMING

OLLI programming is created by our volunteers. None of our instructors or presenters are paid. They volunteer their time and expertise. OLLI programming contributes approximately 30% of our revenue.

# DEVELOPMENT

## WAYS YOU CAN SUPPORT OLLI-UM

**The Annual Fund: A minimum donation of \$100.**  
**Enrolls you as an OLLI Honor Roll Member.**  
*Donations of any size are welcomed!*

**Friends of OLLI Endowment: Ensure the future of OLLI.**

**Sponsor a Program: Honor Someone or a special event.**  
Contact the OLLI office for details to sponsor an individual program or a program series, 734-998-9351 or [olli.info@umich.edu](mailto:olli.info@umich.edu).

*Although OLLI receives generous in-kind support from the University of Michigan, we receive no direct financial support. Our OLLI is funded by memberships and program revenue, an annual distribution from the Osher Foundation Endowment along with grants and donations from members and friends.*

Scan to donate! or click the link here: <https://shorturl.at/tvHQU>



# OLLI-UM STAFF



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## OLLI STAFF ORGANIZATIONAL CHART



# Programming and Committees

OLLI programming is created by our dedicated, passionate volunteers. The curriculum is the core of the program, as OLLI is a volunteer-centered membership organization that utilizes its members' experiences, interests, and talents to plan and lead workshops and educational programs for themselves and their colleagues. You only need to have a passion and expertise in a subject to teach. Ask OLLI staff how to join a committee that interests you. Here are the committees that create our amazing programming.

## STUDY GROUPS

Choose from nearly 60 weekly study groups each session, covering a variety of topics in the areas of humanities, social sciences and STEM (science, technology, environment and mathematics). If you enjoy collaboration and program creation, consider joining the Study Group Committee, which meets monthly.

## LECTURES

Enjoy lectures almost every week, in-person or virtually. Experts speak on a wide variety of cutting-edge social and political issues, science and technology, and the arts. Volunteers plan and implement the various lecture series by brainstorming topics and recruiting speakers on themes of the committee's choosing.

## OLLI OUT OF TOWN

OLLI Out of Town features day and overnight trips, as well as virtual trips to a variety of interesting places. Do you love to have adventures, explore, and travel? OLLI Out of Town allows you to create and participate in identifying travel themes and destinations and planning the itineraries for the programs.

## EVENINGS WITH OLLI

Evenings with OLLI provides informal learning in a congenial setting. Great for prospective members including those who may be looking towards retirement. You can help by joining this enjoyable committee, focusing on conceiving, planning, and publicizing six (6) evening programs per year that highlight interesting people and activities in Ann Arbor or Michigan.

## **SHARED INTEREST GROUPS (SIGS)**

These groups bring people together who have a shared interest they wish to pursue indefinitely within a structure of meetings and activities. Topics can be creative, broad, active and intellectual. Any member can propose a new SIG.

## **OLLI READS**

A shared experience where we read and discuss a common book, then come together for a presentation by the author followed by a discussion.

## **DIVERSITY, EQUITY & INCLUSION COMMITTEE**

The DEI committee focuses on encouraging and supporting OLLI programming that informs and engages our members around issues of diversity. This committee creates programming, collaborates with community partners, serves as a resource and liaison to other OLLI committees.

## **SOCIAL INTERACTIONS COMMITTEE**

Volunteers create opportunities to foster interaction among members by planning and helping implement social opportunities for our members and engaging the community.





## **PROGRAM AND COMMITTEE ATTENDANCE OPTIONS**

- **Finance Committee** – If you have a passion for finance, this committee will engage you in discussion of the status of the financial health of OLLI via monthly review of the budget and related issues.
- **Strategic Marketing and Communications Committee** – If you are passionate about branding, marketing and social media, this committee will allow you to use your expertise to grow the community’s awareness of OLLI.
- **Development Committee** – If you enjoy engaging with people, cultivating relationships, fundraising and supporting our mission, the development committee will allow you to achieve your goals and ours.

## **ATTENDANCE OPTIONS**

- In person only.
- Virtual only through Zoom.
- Hybrid, a portion of program or meeting participants are in person while others are on Zoom. However those on Zoom can communicate and engage with the leader and participants who are in person.
- We offer Zoom Webinar and Zoom Meeting education for those who need technical support.

**Members are personally responsible for checking the website for changes and updates regarding programming (e.g., class cancellation, change in class location, day, or time).**

Contact the OLLI office if you do not have access to the internet, 734-998-9351, Monday - Friday, 9:00 am - 5:00 pm.

## **CAMPUS CE**

OLLI's membership options, courses and registration information are located on the CampusCE platform. CampusCE lists all of our course details (type of program, cost, duration, location), as well as ways to support OLLI with donations. As a membership organization, you must register as a member annually. Our memberships are for individuals, so if you and your partner or spouse want to participate, each person must have their own OLLI account. Here is the link to create an account for new members, or login for existing or returning members, <https://mmcommunityprograms.med.umich.edu/umich/account/signin.aspx>.

Non-members can also take advantage of some OLLI programming at an increased cost. This link directs you to our programs, <https://mmcommunityprograms.med.umich.edu/umich/category/category.aspx>.

Our website has the most up to date information regarding programming changes and/or cancellations. Program reminders and updates are sent out from CampusCE to our members. It is your responsibility to maintain current information and check your email for OLLI communications.

## **MARKETING COMMUNICATIONS**

OLLI supplies a print and online catalog twice a year, one for the fall semester and one for the winter/spring semester. Additionally, we distribute brochures of additional OLLI programming throughout the year. To keep our members informed, we email The Weekly, our electronic newsletter that goes out every Friday afternoon to members with details of the upcoming week. Dedicated emails occasionally are sent for information that is time sensitive and could not be included in our regular communications.

## **INCLEMENT WEATHER POLICY**

During the winter months, OLLI weather policy follows the Ann Arbor Public Schools. If Ann Arbor Public Schools are closed and classes canceled, OLLI in-person programming courses are canceled. Hybrid classes may change to virtual only. There is no change for virtual classes.

## **WAITLIST POLICY**

OLLI uses a lottery system for its registration process for our Study Groups due to class size limitations. If, after the initial registration period and the lottery draw, you are unable to secure a spot in a class due to overwhelming demand surpassing the available seats, you will be placed on a waitlist. If you subsequently make it into the selected course, you just log into your account and pay for the course.

## **PAYMENT AND REFUND POLICY**

Payment is due at registration. Our preferred registration is online where you pay with a debit/credit card or self select scholarship. We also accept mail-in and walk-in registrations with payment by check, money order or cash. For lottery system programs, we do not take payment at the time of registration. Once you are notified you are in the class (registered) you have five (5) days to make your payment or you will be dropped from the course, and a person on the waitlist will be added. Refunds are given for dropped or canceled classes. Please note that a different policy applies to OLLI Out of Town in-person trips. Refunds are given 31 days or more prior to the trip. No refunds are given for trips within 30 days or less.

## **VOLUNTEER AND STAFF COLLABORATION**

OLLI is a membership organization where the volunteers and staff work collaboratively to offer exceptional programming twice a year, as well as pop-ups and new programs throughout the year. The programming is created by the volunteers with the support of the staff. Here are the responsibilities of each.

### **VOLUNTEER RESPONSIBILITY**

Volunteers are responsible for following the policies and procedures of the University of Michigan and the Osher Lifelong Learning Institute. Volunteers are responsible for the creation of the programs for OLLI:

- a) creating meeting agendas
- b) scheduling committee meetings
- c) selecting topics and creating study groups/SIGS
- d) securing speakers/instructors and their information for the catalog & website
- e) reviewing and editing catalogs, brochures, and flyers
- f) working with the staff liaison who must be present for committee meetings

Volunteers vet potential speakers prior to an invitation to speak/present utilizing the vetting process from the University of Michigan and the Osher Lifelong Learning Institute. Leadership Council volunteers advise the Director.

## **STAFF RESPONSIBILITY**

Staff are responsible for following the policies and procedures of the University of Michigan and the Osher Lifelong Learning Institute:

- Staff are responsible for all program/project management of the programs.
- Staff are responsible for all operational/logistics of the programs.
- Staff are responsible for the creation of the marketing and communications materials and programs.
- Staff are responsible for the process and procedures of the programs.
- Staff are responsible for the financials of the programs with the advice and recommendations of the Leadership Council.
- Staff are responsible for communicating regarding all logistics for the programs.
- Staff are required to be present in the committee meetings of the programs.
- The Director makes all final financial and employment decisions with the advice of the Leadership Council.

## **OLLI LEADERSHIP COUNCIL**

OLLI-UM members elect an 18-member Leadership Council which sets priorities and policies on behalf of OLLI's more than 1,000 members. Volunteers who serve in a leadership role or as a committee chair enjoy a rich experience. This deep member participation provides opportunities to use expertise developed over a lifetime, apply it in new ways, and form close connections with fellow OLLI members.

## **EXECUTIVE COMMITTEE MEMBERS**

- Terry Smith, President
- Bernie Beach, Vice President
- Beth Spencer, Secretary
- Lynn Boyer, Past President
- TBD, Chair of Finance

## **MEMBERS AT LARGE**

- Faye Askew-King
- Gloria Edwards
- Rudi Lindner
- Jane Spinner

## COMMITTEE CHAIRS

- Susan Doyle, Diversity, Equity and Inclusion (DEI)
- Emily Eisbruch, Evenings with OLLI (EWO)
- Will Hawk, Study Groups
- TBD, Finance
- Richard Garrett, Strategic, Marketing and Communications
- Jim MacBain & Katherine Woo, Lectures
- TBD, Shared Interest Groups (SIGs)
- Mary Sherrill, OLLI Out of Town (OOT)
- Janet Torno, Development
- Lori Jordan, Social Interactions

## STAFF

- Angela Bingham, OLLI Director
- Ryan Luttermoser, OLLI Assistant Director
- Shannon Etcheverry, Assistant Director-Geriatrics Community Programs

**For more information regarding the OLLI Leadership Council or volunteer opportunities, please contact the OLLI office at Office: 734-998-9351 or email: [olli.info@umich.edu](mailto:olli.info@umich.edu).**

*“Although there is more work to be done, OLLI is in the process of rebuilding a strong foundation to achieve success in its future programs. Both the staff and volunteers reflect a team effort to “showcase” OLLI at U of M as a proud example of successfully meeting challenges and establishing new desirable standards.”*

*- Gloria Edwards*

# COMMUNITY HEALTH SERVICES

OLLI is a part of Michigan Medicine Community Health Services,  
<https://www.michiganmedicine.org/community/community-health-services>.

We are one of the Geriatric Community Programs serving seniors in our community. The Geriatric Community Programs include:

- Turner African American Services Council (TAASC)
- Turner Senior Wellness Program (TSWP)
- Silver Club Memory Program
- Osher Lifelong Learning Institute (OLLI)
- Ann Arbor Meals on Wheels
- Housing Bureau for Seniors

## **Osher Lifelong Learning Institute at the University of Michigan (OLLI-UM)**

Turner Senior Resource Center

2401 Plymouth Rd., Suite C

Ann Arbor, MI 48105

[www.lli-umich.org](http://www.lli-umich.org)

[lli@med.umich.edu](mailto:lli@med.umich.edu)

734-998-9351

Hours: Monday through Friday, 9:00 am - 5:00 pm.

Follow us on Facebook and LinkedIn @OLLI-UM

## **OLLI, Where Learning Never Retires.**

