

OSHER LIFELONG LEARNING INSTITUTE

at George Mason University



MEMBER HANDBOOK

OLLI STAFF MEMBERS

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WELCOME TO NEW MEMBERS!

This handbook has been prepared to make your orientation into the Osher Lifelong Learning Institute (OLLI) family more comfortable. Within its pages you will learn basic information about how the Institute operates and how you can enhance your own OLLI experience.



You've already become acquainted with the contents of our catalog, its terrific class listings, club offerings, special events and trips. Before long, you will learn what kinds of courses you most enjoy—large lectures, small friendly discussions, performance groups or language classes. We encourage members to visit each of the three locations to broaden their OLLI program choices.

A liaison in each class will introduce the instructor to you, inform you of any special announcements and remind you to always wear your name tag, necessary in our large organization as a courtesy to the teacher and fellow students. The liaisons will also remind you to sign in at each session, thereby keeping staff informed about attendance and the success of the class.

CATEGORIES OF MEMBERSHIP

- “Full” members – Entitled to unlimited* courses and activities at any OLLI location, renewable annually for four terms. (Annual dues are \$360.00.)
- “Introductory Rate” members – Entitled to unlimited* courses and activities at any OLLI location for one term for \$150.00 ; can be continued for the three subsequent terms for additional \$250.

* As space is available

PURPOSE AND BACKGROUND

Our purpose is to provide intellectual and social experiences for retirees and older adults in the Northern Virginia community. Founded in 1991, we are an independent organization run by our members on a volunteer basis, with a small paid administrative staff. OLLI is an affiliate of George Mason University (Mason), a member of the Road Scholar (Elderhostel) Network and receives support from the Bernard Osher Foundation. No one will ask you to take an exam, and you won't be concerned about earning credits either. Your courses, attendance at special events and ongoing activities will provide you with many opportunities to make friends. One annual fee covers all activities for an entire year from the date of payment.



STRUCTURE

Governance of our Institute falls to a Board of Directors elected by the membership on an annual rotating basis. Board members serve three-year terms and may be re-elected, but may serve no more than two terms consecutively. The Board elects its own officers, and they include President, Vice President, Secretary and Treasurer.

The Board of Directors normally meets at ten o'clock on the third Friday of the month at Tallwood and at least once annually in Reston and Loudoun. These meetings are open to members and, in fact, the Board encourages members to attend. Becoming informed about important OLLI matters, future plans and policies is a good investment of member time. An annual meeting occurs in late spring where those running for upcoming positions on the Board present their qualifications for office.

The Board sets policies, approves the budget and oversees the functions of the Executive Director. It also sets up standing committees that currently include audio-visual support, communications, development, facilities, finance, hospitality, landscaping, member services, program, outreach and strategic planning. In addition, there are resource groups that assist in the development of our program in the following areas: Art/Music, Economics/Finance, History/Current Events, Humanities/Social Sciences, Language/Literature/Theater, Religious Studies, Science/Technology/Health and Special Events. The President appoints the chairs for each committee and each chair is responsible for selecting its members. Some committees require more members than others, and all chairs welcome inquiries about opportunities to serve on their committees.

The Executive Director works at the behest of the Board of Directors and is responsible for the smooth-running operation of the Institute. He oversees the staff and office, the overall program and outreach. He is also OLLI's contact person and represents us to the public.

STAYING INFORMED

The OLLI Catalog

The current term catalog is the primary source of information about the ongoing operation of OLLI. In addition to courses, special events and clubs, members will find information about site locations, registration procedures, Mason privileges, closing policies, directions to classroom sites and opportunities to support OLLI financially. The catalog is available in hard copy and on-line at the OLLI Web site.

The OLLI Web site:

OLLI's own Web site (www.oli.gmu.edu) contains a vast amount of information about the Institute and is updated frequently. It's the place to look first for answers to your questions.

Email Messages

The OLLI office frequently sends email messages to the membership, informing them of developments that will keep them aware of what is going on with the Institute, especially matters that affect them. Email is also used to confirm course schedules and provide updates and timely reminders. ***Members should ensure that OLLI has a reliable email address.*** This can be done via the "Membership" menu of the online Member Portal. We also suggest that the web address (oli@gmu.edu) be included in address book or contacts on members' personal computers.

OLLI E-News

Each Friday a new edition of *OLLI E-News* is emailed to all members with email addresses and posted on our Website. This publication gives timely, informative and interesting news about ongoing OLLI activities. A paper version for members without computers is available in the classrooms on the following Monday when classes are in session. In addition to the E-News, the "OLLI Loudoun Notes" and "Eye on Reston" newsletters are periodically sent to members who wish to receive information specific to those locations. Recent versions of these newsletters may be found on the "What's New" page of the OLLI website.

Membership Directory

We continuously update the Membership Directory, which includes names, addresses, phone numbers and email addresses for all members. The current version is available online via the OLLI Member Portal to all members. We also print a small number of copies twice a year for those members without computers.

Bulletin Boards

You will find messages of interest on bulletin boards at each location, including information about senior activities outside of OLLI. Members who are interested in carpooling or who need a ride to OLLI locations can post information on the bulletin boards. Be sure to check the boards from time to time, especially if you are also interested in ride sharing.

Facebook

OLLI members may consider joining the OLLI Facebook group as a means of enhancing intra-OLLI communications. You can access this group by clicking on the Facebook icon on the OLLI website.

Feedback

Feel free to question or make suggestions to Board members about any issue that concerns you. Suggestions on any topic are welcome, and suggestion boxes are located in various places at each OLLI site. You can make your thoughts known through the Suggestion Box in the “Contact Us” menu of our website as well. The staff at the Tallwood office is there to help you between the hours of 9 am and 4 pm while classes are in session, and 9 am and noon between terms. You can also speak to the OLLI staff assistants in Reston and Loudoun. Staff will also respond in a timely manner to emails sent to olli@gmu.edu.

FRIENDSHIP

New members looking to enlarge their circle of friends through membership should take advantage of clubs and special events. Be proactive by introducing yourself to others in classrooms before class begins or in the social room. OLLI members are a sociable bunch and especially if you are wearing a name tag with a red dot on it, they will greet you with a warm welcome. To encourage collegiality and friendships, it is our expectation that all OLLI members wear their official nametags to OLLI courses and activities. If you ever forget or lose your nametag, please ask an OLLI staff member for a replacement or a temporary name badge.

You will find that friendship is the ultimate result of volunteer involvement because committee work requires plenty of give and take where we get to know each other well. Our list of volunteer opportunities covers a broad range of services and calls for a variety of skills. As your interests and talents become known, committee chairs will identify how best to use them in service to the Institute.

VOLUNTEERING

Without volunteers, OLLI would not exist. Volunteers defray costs that would otherwise have to be covered through member dues. Rather than pay for many operating costs, member volunteers do a large proportion of the work of running the organization. Course instruction, comparable to that found in college, is provided without remuneration. No, even the Mason professors don't get paid! The program quality of OLLI classes continues to be the core of the Institute's recognized success and leadership in the Lifelong Learning Institute (LLI) field.

Volunteering offers opportunities for enjoyment beyond that of participating in class experiences and should be personally satisfying and rewarding. You need not have prior experience or expertise in a particular field, although this is always welcome and in a few cases, necessary. Everyone has the talent to help in some capacity. Training, when necessary, is available. You should volunteer to do only what you want to do. We know your time is valuable. We do not ask you to put in more time than you can handle comfortably or serve longer than desirable. You can always change your volunteer activity.

Often members express concern that they don't have the time or the talent to give service to OLLI in the areas available. The desire to give back can be satisfied in alternative ways; some of our members choose to contribute additional money to the Friends of OLLI.

How to Volunteer

Please do not wait to be asked. Rather, take the initiative. OLLI committee chairs and Board members are always on the lookout for help. After checking out the opportunities on the following pages, you may find a particular job attractive to you. Call the office at 703-503-3384 and offer your services or check the catalog or the Web site for the name of the chair of whatever committee interests you. Word travels fast, and you will be contacted.

What Is Expected of Volunteers

Promptness: Always show up on time.

Dependability: Attend committee meetings or let your committee chair know in advance of your absence.

Initiative: OLLI thrives on new ideas. Feel free to share your ideas with your chair or leader and be willing to follow up if you've been given a green light.

Responsibility: No matter how small or large the job may seem, it is essential to OLLI's success.

What You Can Expect

You should expect clear and professional communication from your leader, appreciation for your time and effort, respect, and whatever training is necessary.

If you feel there are deficiencies in any area, talk with the person overseeing the activity. Feel free to speak to the Executive Director, the President or any Board member if you notice that something needs to be addressed.

VOLUNTEER OPPORTUNITIES

Audiovisual Support Committee

Mission: Support effective classroom environments by assisting the staff in maintaining and improving classroom audiovisual and computer/information technology equipment.

Responsibilities:

- Help staff to identify what instructors and presenters wish to do with AV and computer equipment, and help solve any problems encountered.
- Work with staff and any technical consultants to achieve acceptable sound quality from audio systems, and visual quality for images projected from visual aid support systems.
- Suggest appropriate software and standards for equipment settings and for locations of commonly needed tools on OLLI laptops for implementation by staff.
- Suggest appropriate labels for implementation by staff to remote controls and corresponding systems and cabling; add instruction manuals to laptops where appropriate.
- Collaborate with staff and consultants on training for how systems work and for A/V problem solving.
- Provide support for restoration of A/V functional disruptions during class sessions, by technical support squad members in class population.
- Advise staff, Finance Committee and Board on audiovisual and computer equipment budget and acquisition.

Communications Committee

Mission: Provide timely, useful and cost-effective non-emergency communications with the membership and publications production support to the staff and Board.

Responsibilities:

- Oversee OLLI Catalog, *OLLI E-News*, the OLLI Web site and other publications to assure their consistency, accuracy, attractive appearance and conformity with professional journalistic standards.
- Initiate and encourage submission of articles and notices for *OLLI E-News* related to OLLI and its affiliated organizations deemed of interest to the membership.
- Provide an electronic forum in *OLLI News* for members to communicate their comments, suggestions and concerns about the institute to their fellow members as well as to the leadership.
- Develop procedures and guidelines to ensure that all publications contain only materials appropriate for dissemination to the membership, and if the material is intended for release on the Web site, that the content is appropriate for an external audience and does not include privacy information.
- Provide technical and editorial support upon request to officers, staff and committee chairs in the preparation of the quarterly catalog of OLLI courses, *OLLI Ink*, Poets of OLLI, the Membership Directory, and Member Handbook as well as brochures, invitations, flyers and other materials for special purposes, including any publications intended for dissemination beyond the membership.

Development Committee

Mission: Plan and coordinate, in concert with the executive director and Finance and Strategic Planning Committees, all short-term and long-range fund raising activities for OLLI.

Responsibilities:

- Prepare and monitor a Development Plan (Fund Raising Plan) for OLLI.
- Design and conduct the Friends of OLLI annual fund raising Campaign.
- Advise OLLI members on alternative methods of giving.
- Identify and organize appropriate grant, contracting, sponsorship and

other related fund raising activities.

- Oversee and monitor fundraising events, e.g., silent auction.
- Develop and maintain relationship with the George Mason University Foundation and the University's Development Office in matters relating to philanthropic fundraising.
- Advise the OLLI Board and the President on matters relating to development/fund raising, including special/individual fund raising solicitations.
- Work with the OLLI Finance Associate to monitor fund raising activities, prepare thank you letters, and assemble reports.

Facilities Committee

Mission: Develop plans and proposals for the Board of Directors to ensure that the facilities at all present and future OLLI campuses support the overall mission of OLLI.

Responsibilities:

- Monitor needs for improvements in five categories: classroom, parking, technology, socialization and storage.
- Prioritize needs for facility, equipment and land utilization.
- Coordinate planning with the executive director and other committees as appropriate.
- Make recommendations for funding facility modifications.
- Present plans to meet both short- and long-range needs.

Finance Committee (Policy)

Mission: Oversee the financial policies and procedures of the institute to assure its fiscal soundness.

Responsibilities:

- Assist the Treasurer and the Executive Director in the preparation of an annual operating budget for approval by the Board of Directors.
- Assist the Treasurer and the Executive Director in the monthly review of operating financials.
- Assist the Treasurer in periodic review of the organization's accounting procedures and controls to provide reasonable assurance that accounting and bookkeeping transactions are properly recorded.
- Assist the Executive Director, Finance Associate, and Treasurer in

review and acceptance of the annual audit report. (The Treasurer and Executive Director first review the annual audit report and then present it to the Finance Committee for acceptance, with the option to elect to have the presentation made, in part, by the auditor. Following acceptance of the annual audit report by the Finance Committee, the Treasurer presents the report to the Board for its review.)

- Assist the Executive Director, Finance Associate, and Treasurer in review of the results of the annual Form 990 tax return prepared by the CPA firm and filed with the IRS.
- Assist the President, Executive Director and Treasurer in negotiation of outside agreements; i.e., the Mason Affiliation Agreement, the Mason Lease Agreement, the Mason Foundation Affiliation Agreement, the Fairfax Swimming Pool Parking Lease, the Washington Baptist Church Lease Agreement, the Financial Audit agreement, et. al.

Instructors and Speakers

Approximately half of OLLI courses are taught by member volunteers. OLLI staff and the resource groups support members who would like to teach. Courses can be adapted to different teaching styles (lecture, discussion, seminar, hands-on). Our experienced member instructors are available as mentors for new instructors. There are regular opportunities for guidance and training for any member interested in teaching. If you would like to teach, you are encouraged to become an instructor. There is a **Teacher's Manual** available via the office or on the OLLI website

Landscaping Committee

Mission: Provide an attractive, changing outdoor environment for the Tallwood campus in the area surrounding the buildings and parking lots.

Responsibilities:

- Design each garden as an outdoor classroom.
- Prepare each garden for proper sustenance of plants as well as for changing sight lines.
- Provide areas for socializing.
- Acquire the most reliable plant materials.
- Install plants, hardscape, structures and other materials .
- Maintain the gardens year round with tools stored in shed.

- Advise on budgetary needs for building and maintaining garden beds.
- Advise the executive director when a tree or plant on Tallwood property needs maintenance by Mason or removal by Mason.
- Coordinate with other committees regarding planning, development, transplanting and other landscaping needs on existing or expanded facilities in the future.

Member Services Committee

Mission: Promote membership retention and satisfaction; provide certain member services at the Tallwood, Reston and Loudoun locations.

Responsibilities:

- Via the Hospitality Subcommittee, make arrangements for refreshments at OLLI meetings and events such as the Kickoff Coffees, the annual Holiday Party, Town Meetings, etc.
- Ensure that needs, concerns and suggestions of members are addressed through a variety of communication methods.
- Arrange social events and encourage more social activity among members by facilitating small interest group development, and extend programming to include social components.
- Organize volunteers to assist in the OLLI Tallwood office.
- Maintain volunteer aspects of social rooms or areas such as exhibits, bulletin boards and lending libraries.
- Represent and advocate for the membership perspective to the Board of Directors.
- Provide member services at the Reston and Loudoun campuses, including social activities, communication, and coordination with the respective coordinators.
- Arrange for liaisons in each class to introduce instructors, make announcements, monitor attendance and solve problems or seek staff help for same.

Class Liaisons:

At the beginning of each term, before classes begin, the Liaison Coordinators ask an individual from each class to act as its liaison. The liaison assists in the functioning of the class and communicates pertinent information. The staff provides guidelines about liaison responsibilities. Announcements and

reminders are provided via the *OLLI Communicator* each week during terms. When you register, you may indicate your willingness to be a liaison by checking the box next to the course title.

Office Volunteers:

Office volunteers comprise a subcommittee of the Member Services Committee. They work in the office as receptionists, make and answer phone calls, receive messages, operate the fax machine and photocopier, handle inquiries, mail requested materials and otherwise assist the staff. Assistants work one or more days a month. Training and instruction are provided. This activity offers social interaction and is a valuable asset to a very busy office. Contact the Member Services chair.

Outreach Committee

Mission: Provide appropriate communications outside of OLLI and to the community in order to create positive visibility and encourage membership.

Responsibilities:

- Recruit members through marketing, publicity, placement of materials, booths at community and senior fairs, a speakers' bureau, encouraging members to promote OLLI to friends and acquaintances, and other appropriate means.
- Coordinate with Executive Director and staff to develop and distribute appropriate promotional flyers, brochures, and related materials.
- Assist Executive Director and staff in development and use of presentations (e.g., PowerPoint, video, etc.) for use in recruitment and promotion of OLLI.

Program Committee

Mission: Serve as a forum for communication and information exchange by chairs of OLLI Resource Groups.

Responsibilities:

- Plan and coordinate all term educational courses, special events, trips, and programming for all OLLI locations.
- Review course offerings for balance of content and format at all

locations.

- Support the work of class coordinators and serve as point of contact between the OLLI staff and individual Resource Groups.
- Coordinate with Executive Director and Program Associate regarding needs of resource groups, instructors, speakers, and coordinators.
- Provide input for invitations to the annual Teacher Appreciation Reception.
- Provide input to the Executive Director regarding award of OLLI scholarships to various Mason schools, colleges, departments, and/or institutes.

Membership of the Program Committee consists of the chairs of the individual Resource Groups. These Resource Groups, representing each of the academic discipline categories listed in the OLLI catalog, are made up of member volunteers who meet two or three times a year to share ideas for future courses. Members of these groups work to develop and implement courses each session.

Resource Groups

Since the strength of OLLI's program comes from member input and participation, members who are interested in the program are encouraged to join one or more resource groups or serve as liaisons in classes they attend. You should contact resource group chairs listed by category in the current catalog. Resource groups are subject-area groups that start out brainstorming ideas for classes and instructors and work through to suggest specific classes for their catalog subject area. For each suggested class, they strive to identify potential instructors or a resource group member who will coordinate the recruiting of instructors for that class. The Program Associate and the Executive Director provide staff support to the resource groups. The Executive Director provides ideas and strategies for classes and instructors and coordinates contacts with Mason faculty members.

Special Events Resource Group

Special events are those singular activities like expert lectures, performances or field trips offered each term. Volunteers on this subcommittee develop these events and serve as coordinators during the presentations or on bus tours, making sure that all arrangements are in order. General familiarity with opportunities within the geographic area is needed. Ten to twelve meetings a year are devoted to planning events,

and additional time is needed to develop any one event. At least one year of active commitment to this subcommittee is desirable. Contact the chair of the Special Events Resource Group

Strategic Planning Committee (Policy)

Mission: Develop short-term and long-range strategic plans for consideration by the Board of Directors. In fulfilling its mission it will monitor and update the implementation of *Pathways to the Future* as a “living document.” The committee will seek to understand the internal and external trends, challenges and opportunities that may influence OLLI’s future.

Responsibilities:

- Advise OLLI’s President and Board of Directors on matters relating to strategic plans. Such advice may include matters relating to trends, operations and strategic planning.
- With the President and Executive Director plan and conduct, as needed, a Board of Directors retreat to assess and review current and future issues and opportunities confronting OLLI.
- Monitor the implementation of *Pathways to the Future* and the activities of various “task groups” emanating from it. To ensure that *Pathways* and other planning initiatives result in meaningful “living documents”, it will monitor and assess implementation and, as appropriate, propose policy changes and modifications as necessary.
- Initiate the collection and analysis (assess & review) of data collected through surveys, focus groups, interviews, studies and other research methods.
- Meet and coordinate with OLLI committees as well as encourage communication with various external communities, LRIs and OLLIs to assess and understand the issues, trends and challenges occurring in both our internal and external environments.
- Monitor facilities and organizational planning and support for new OLLI sites.

OLLI CLUBS

In addition to the many courses and volunteer opportunities, you may be interested in participating in one or more of these ongoing club activities:

- Book Club
- Bridge Club
- Classic Fiction Book Club at Loudoun
- Cooking Club
- Financial Roundtable
- French Book and Activity Club
- Gourmet Club
- History Club
- Homer, etc.
- Personal Computer-User Group (OPCUG)
- Photography Club
- Recorder Consort
- Knitting & Needlework
- Tom Crooker Investment Forum
- Travel Club
- Walking Club
- What's In the Daily News?

Details about each club can be found in the catalog.



Photos by members of the OLLI Photography Club

UNIVERSITY PRIVILEGES

The following privileges are available for all OLLI members. For most of them, a “G number” is required; others also require a GMU photo ID. Applications are available in the OLLI office and in the “Doc Store” of the OLLI Web site.

Mason Recreation Pass - Aquatic and Fitness Center, Recreation Athletic Complex (RAC), and Skyline

- Participants offered annual memberships at the same rate as employees of the University (currently \$250)
- OLLI members receive a parking pass with their membership. This offer does not extend to faculty, staff, administration or other affiliates.

Freedom Aquatic and Fitness Center (Prince William Campus, Manassas, VA)

- 15% discount off of regular annual membership rates

Book Store

- Same privileges as faculty and staff
- Faculty and staff receive a 10% discount on most merchandise.
- Exclusions include, magazines, newspapers and convenience items or as designated.

Johnson Center Cinema

- Same discount as offered to faculty and staff (\$1 fee for movies).

Dining Services

- Same discount as offered to faculty and staff

Library

- Take out up to ten books at one time
- Books may be withdrawn for a 3 week period with one renewal
- Request books from other University campuses
- Use of Arlington Law Library is excluded
- Access to hundreds of online databases via the GMU library Web site (requires GMU email address).
- Current OLLI instructors and speakers may also borrow audiovisual materials (videos, DVDs) from the Johnson Center Media library for one week.

Patriot Center

- Same discount as offered to faculty and staff card holders
- Discounts vary per event (requires Mason ID card)

Center for the Arts (Performing Arts)

- Discounts vary and are not available for all events (requires Mason ID card)

CUE Bus

- CUE Bus rides for free with show of Mason ID card

Apple Federal Credit Union

- Entitled to join as a member of the Credit Union
- Same benefits as all Apple Credit Union members

Capital One Bank

- Check-cashing privileges at Capital One Bank campus locations (requires Mason ID card)

Mason Inn

- Same discount as offered to faculty and staff
- Group room block discount available.

Updated February 2012; All privileges subject to change.



OLLI AFFILIATIONS

George Mason University (Mason)

Our relationship with Mason is set forth in an affiliation agreement last signed in 2007. Under this arrangement, Mason provides OLLI with space on its campus to conduct OLLI activities on a rent-free basis and furnishes reimbursable supporting services. Mason faculty members are encouraged to teach at OLLI on a voluntary basis without remuneration or honoraria.

In turn, OLLI grants scholarships to the GMU Foundation, awarded to Mason students; establishes close-working relationships with selected Mason departments, participates in joint and cooperative programs of classes and activities with university entities and informs OLLI members of Mason's educational, social, cultural, community and other activities.

The agreement also provides that Mason and OLLI will support one another's educational and financial objectives, policies and goals before national, state and local government bodies.

The Bernard Osher Foundation

OLLI is one of many LLIs in the United States that have received grant support from the Bernard Osher Foundation. The initial grants in 2004 and 2005 were used primarily to repair and update existing physical facilities, including construction of additional restrooms and roof repair at Tallwood, the installation of modern audio-visual equipment in classrooms, and initial funding for the salary of an executive director. In addition, Osher contributed a \$1,000,000 endowment to the GMU Foundation in 2006, with interest income provided annually to OLLI.

Elderhostel Institute Network (EIN) and Road Scholar

EIN is a voluntary association of lifelong learning institutes funded by Elderhostel, Inc. Formerly known as Exploritas and Elderhostel, Inc., Road Scholar is a nonprofit organization dedicated to providing educational opportunities to older adults. Affiliates must maintain high quality academic programs. For further information, go to www.roadscholar.org/ein/intro.asp.

THREE OLLI LOCATIONS



Fairfax – "Tallwood"
4210 Roberts Road, - Fairfax, VA 22032



Reston - Lake Anne - Washington Plaza Baptist Church
1615 Washington Plaza North, Reston, VA 20190



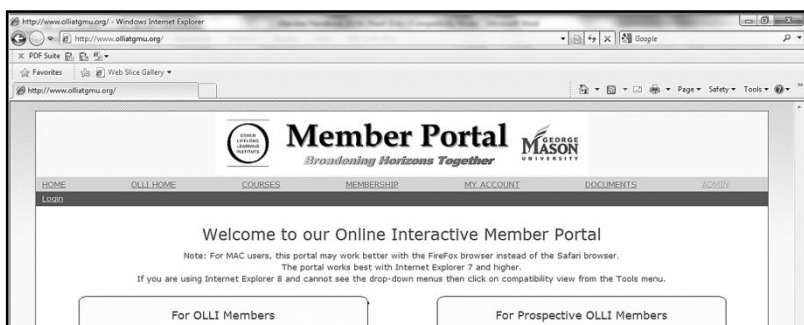
Loudoun - 21641 Ridgetop Circle,
Sterling, VA 20166

OLLI ON THE WEB:



The OLLI website (www.olligmu.edu) has a wealth of information. Use the Quick Links at the left to find information.

OLLI MEMBER PORTAL:



Use the Member Portal for registering, updating contact information, voting, viewing Board documents, and accessing the online Member Directory.

OLLI SPIRITWEAR



On the web: <http://olligmu.promoshop.com/>

Order sweatshirts, shirts, caps and tote bags with the OLLI/Mason logo at any time directly from the vendor for delivery to your home. At the store, click "OLLI-GMU Store" to see the pictures, then click on each item to see details. **Note:** *The pictures do not show our logo but it will be embroidered on items that you order.*

