

## ***U3A FACES THE FUTURE – THE CHARTER AND THE CHALLENGE***

***Paper delivered to the U3A Network NSW Inc Annual Conference at Armidale, NSW, 8<sup>th</sup> May 2014 by Ron Browne<sup>1</sup> and Ainslie Lamb<sup>2</sup>***

We read or hear that the average age of participants in organisations such as Meals of Wheels is increasing, and that this is regarded as a problem for the future if younger people do not join in and volunteer their services. Perhaps it doesn't matter in the long run, as some other organisation or other method of providing their welfare services comes to the fore.

But U3A is different because of its origins and purpose. So what is the future for U3A? And it is important to remember that the future is not something in the distance, but depends on what we create today.

### **The Charter**

Let us briefly review the formation of the U3A Movement. Significant social change enveloped the West in the second half of the twentieth century. Many factors were at work including rising affluence and the advent of retirement – before the second half of the 20th century adults spent virtually all their adult lives working. The concept of retirement came with the welfare state and pensions.

It was in this context that the first University of The Third Age was established in Toulouse, France in 1973, by Professor Pierre Vellas. It was a type of university extension with courses initially offered in the university summer break by members of various faculties; its main objective was to improve the quality of life of the elderly.

Vellas focussed on two main areas of activity: providing courses for retired people, and promoting research into the process of ageing which had been fairly limited to that time. In respect to the former, his efforts were well received and the concept flourished, soon spreading to other parts of Europe.

The concept was taken up in England by Dr. Peter Laslett and colleagues at Cambridge in 1981, where the model underwent significant change. Unlike in France with its formal, direct links to universities, it was based on relatively informal, self-directed and self-funded study groups. It also incorporated the concept of reciprocal lifelong learning – there was to be no distinction between teachers and the taught, and members would as far as possible be both teachers and learners.

Laslett was also responsible for developing and refining the concept of the 'Third Age' as the age of personal achievement and fulfilment following the periods of employment and child raising. This was a time for older people to reflect and learn for its own sake. As he so perceptively put it:

*The Third Age is that of the greatest personal fulfilment, the apogee of life.*<sup>3</sup>

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<sup>3</sup> Laslett P, *A Fresh Map of Life*, MacMillan, London. (2<sup>nd</sup> Edition, 1996) back cover.

Laslett was alert to the fact that some in the community make the fundamental error of taking the minority, a small minority, of aged people - the chronically sick, those who cannot look after themselves and those who live in institutions – for the whole body of the retired, confusing the Third Age with the Fourth Age. It was for this reason that Laslett wrote his seminal text calling for *A Fresh Map of Life*.

For Laslett, research was also to be a part of U3A activities: in his statement of the objects of the initial English U3A, the seventh object was:

*To undertake research on the process of ageing in society, and especially on the position of the elderly in Britain and the means of improvement.*<sup>4</sup>

Laslett expected every U3A member to have a research project of his or her own and to write up its results.

U3A first came to Australia in Melbourne in 1984 and the first U3A in New South Wales was established at Nowra (Shoalhaven Third Age of Learning) in 1986. From there, over a thirty year period, it has grown to about 250 groups and over 85,000 members throughout Australia.

In 2008, a research team led by Dr R Swindell conducted a survey of U3As in Australia and New Zealand, and the results were most interesting. The survey revealed a profile of a growing movement which

*“... quietly provided many, very-low-cost opportunities for members to take part in most or all of the successful ageing activities that are associated with continued independence in later life... Few organisations for retirees can point to a similar range of mentally, physically and socially stimulating courses, and the wide variety of volunteering opportunities provided by most U3As”<sup>5</sup>.*

Hidden in such statements, are real life stories of the benefits so many have derived from participation in U3A. One man who had worked all his working life with an international tractor company was bored early in retirement and fortunately joined a U3A creative writing group. He blossomed as a writer drawing on his rich range of life experiences and ultimately had several short stories published by national magazines. A woman who had achieved much as a folk singer joined another U3A group – while it took some time for her colleagues to “discover” her talents and experience as a singer, she now leads a new music group at the U3A. And there are many members who have lost their life partners who find friendship and support through their U3A group.

So what has been achieved in New South Wales so far? First, U3A is continuing to grow. In 2008 there were 22,000 individual members in NSW U3A’s - today, there are 28,000 members. Over the years, the Network has developed services for its member U3As, including affordable Public Liability insurance and copyright licences, an expanding and popular Resources Library, and promotional support. U3A in New

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<sup>4</sup> Laslett, *ibid*, p227

<sup>5</sup> R Swindell et al., *Universities of The Third Age in Australia and New Zealand 2008: Capitalising on the Cognitive Resources of Older Volunteers*, Aust Journal On Ageing 2008, V. 30, No. 4 p.200)

South Wales is also developing a collegial and co-operative ethos through the Network website and associated links to member U3As.

At the local level, there is a wide and expanding range of courses which offer mental and physical stimulation. In addition to popular courses such as computing, literature, philosophy, history, current affairs and creative writing, we noted the following when surfing the Network website recently: Courses on *Great Conductors*, *Africa To-day*, *History of the Calendar and Time Zones*, *Rights of the Aged* and *Street Art*. One U3A conducted a session featuring collectables based on the former ABC program. Another fostered a program of mentoring high school students, while another conducted field excursions to local engineering structures.

Another group is involved in holding an annual lecture at which a noted scholar speaks on a topic relating to community advancement.

For those interested in the esoteric, a course on *Discoveries in Consciousness* is offered, and for those wanting something more exotic a course titled *Tribal Style Belly Dance*.

The range of interests of Third Agers, and the talents of Third Agers to teach these interests, seems to have no limit.

Over time, U3A has engaged with the wider community. U3As have developed relationships with local Councils and retirement villages, local newspapers, radio and television stations, and other older age group organisations in their localities. The Network Committee is building relationships with other State and national organisations with similar or complementary agendas, including the New South Wales Office for Ageing, Council of The Ageing (COTA) and Alzheimers Australia.

Laslett envisaged U3A as a self funded movement, and this is essentially still the case. He advised against accepting government grants. but on the broad issue of external funding, opinion is divided. In New South Wales, all recurrent administrative costs of the Network are met by the Network's members and the current four year grant from the State Government is applied solely to supporting the promotion and expansion of the U3A Movement in New South Wales. Some individual U3As have received support in funding or in kind from Councils and sponsors and the acceptance of this support has not undermined the basic self supporting character of U3A nor comprised its independence. What has been of benefit has been the opportunity to develop relationships with local and State Government at a policy level, for example to contribute to Councils developing Positive Ageing policies and the New South Wales State Government's *Whole-Of-Government* policy which embraces all relevant Departments dealing with matters affecting older citizens,

While both Vellas and Laslett advocated the promotion of research into the process of ageing, this practice has not been a feature of our U3As and the greater majority of research in these areas has been conducted by academic researchers in the fields of gerontology and health. However U3A members have assisted university researchers as willing participants in projects looking at various facets of gerontology – things like anxiety and changes to brain activity in aged patients, pharmacological treatment of ageing and ageing and neuroplasticity. There is also the developing area of research into the value of the creative arts, whether it be dancing, painting, or choral and

instrumental music, and how participation in these can promote the well-being of older people including those with dementia.

## The Challenge

What are the challenges posed for a growing U3A movement - can U3A now rest on its laurels or is there more to be achieved?

In this segment, we are drawing on ideas in a recent paper by Marvin Formosa of the European Centre for Gerontology entitled *Renewing Universities Of The Third Age: Challenges and Visions For The Future*<sup>6</sup> Formosa approached his topic by recognising that U3A in several different formats is a global success story in meeting the educational, social and psychological needs of older persons, but he raised some challenges facing U3A generally, which we can apply to an analysis of the challenges of our own situation.

The first challenge is, **will U3A continue to grow?** Ageing populations are transforming the social and economic landscape across the world. Longevity in Australia has created a demographic in which 14% of the population is now aged over 65 and no longer in the workforce<sup>7</sup>, but with 20 years or more of life ahead of them. This figure is predicted to rise as life expectancy increases with better nutrition and medical support. What is evident now is that people are living more productive older lives than fifty, or even twenty years ago. The issue now is not so much how long we live and work but rather the quality of our lives.

We also know that academic applied research into the value of cognitive development and brain health in older people suggests that lifelong learning is an important factor in ‘preventative health’, and minimising the risk of dementia<sup>8</sup>. Many older people wish to engage in meaningful activities and opportunities for new experiences, so the challenge is to provide those opportunities for continued learning, not as an economic imperative but to enhance positive ageing.

At past conferences there has been some speculation as to how the Baby Boomer generation can be encouraged to join U3A, as though it was a hurdle to be overcome. Adapting to the concept of the Third Age is not so much about chronological age or retirement but about self-fulfilment in the latter part of one’s life course. That generation will join anyway, for the same reasons that members have joined in the past – to learn new things, to participate in creative activities and to keep their minds active. There are also the social benefits of meeting new people of like mind in a supportive atmosphere.

But they might not join straight away upon retirement. There are many of alternatives available for older people to choose from once they leave the workforce. Many of

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<sup>6</sup> M. Formosa. *Renewing Universities Of The Third Age: Challenges and Visions For The Future*, Magazine of Thinking and Analysis. 2009 No. 9 (pp. 171-196).

<sup>7</sup> *Australia's fastest growing age group is 65 and over*, ABS, reported at [www.abc.net.au/news/2013-12-18/fastest...age...65...over.../5164202](http://www.abc.net.au/news/2013-12-18/fastest...age...65...over.../5164202)

<sup>8</sup> G Beaumont, *Arts Activity Proven to combat Dementia*, Study at Canterbury Christ Church University *Reawakening the Mind*, by Arts4Dementia, as reported in Limelight, 13 May 2013. Similar research results are reported by Arts & Health Australia, [www.artsandhealthaustralia.com.au](http://www.artsandhealthaustralia.com.au)

them will pursue a “bucket list” in their early retirement years (travel is a popular activity), but many will not have the income stream to live the high life indefinitely or at all. Further, the Third Age can in fact be concurrent with the Second Age insofar as a person may be in part-time employment, or may be the carer of grandchildren or aged parents. But with better education levels than previous generations, it may also be that more will prefer U3A to other activities. Sooner or later they will need food for the mind: they’ll join U3A when they are ready.

A recent Network survey<sup>9</sup> indicated that while 38% of our NSW members are aged 61-70 years of age, over 40% are in their seventies, and some into their eighties or even older. One of our larger U3As indicated that 29% of its members were in their sixties while 54% were in their seventies. These figures might suggest that existing members are just getting older but that is not necessarily the case. It may just be that after retirement in their early sixties – or earlier – people are achieving other ambitions and are then coming into U3A for personal fulfilment. Clearly, the seventies are becoming among the most self fulfilling years in the life course. So we can hopefully expect that people in that age cohort who wish to maintain mental stimulation will remain a continuing source of membership for U3A.

The second area of challenge is **Social Inclusion**. There are several aspects of this which we can consider in relation to the future of U3A.

About three quarters of U3A members are women. While men in general terms have a lower life expectancy than women, to some extent men have traditionally been more likely to favour the company of other men and to belong to sporting and male dominated social clubs. The growing popularity of Men’s Sheds is possibly more attractive to some men than is U3A. COTA has identified a problem of depression for older men, especially those who are widowed or single. There are things, however, that U3A can work on. We can be involved in the COTA Mate-to-Mate Peer Education program, and our publicity also needs to demonstrate the involvement of men in our courses so as to encourage more men to belong to U3A. At least one U3A (Clarence River) has its own Men’s Shed, and other U3As offer courses that are more attractive to men such as restoring furniture or woodworking and other material skills.

Another factor is that access to a U3A in New South Wales is often more limited in rural and remote communities, so a further challenge is to increase the availability of U3A in these parts of the State.

ABS statistics indicate that just over a third of NSW residents live outside Sydney, and that many of these communities have proportionately larger populations of older adults aged 65 years and over than in Sydney most notably in coastal retirement towns where U3A flourishes<sup>10</sup>. But there are a number of sizeable towns in rural New South Wales that do not yet have a U3A. These include Broken Hill, Glen Innes, Gundagai, Hay, Narranderra, Wagga Wagga, Wellington and Young. To start a new U3A group, it is desirable to have someone in the local community to take the initiative – it might

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<sup>9</sup> J de Hosson, reported in *Newslink*, November 2013.

<sup>10</sup> 3218.0 - *Regional Population Growth, Australia*, 2011 at [www.abs.gov.au](http://www.abs.gov.au) › ABS Home › Statistics

be a Council official, a community worker, a librarian – and ideally someone who has previously had contact with U3A. The Network is working on that issue.

Most U3Aers are of the Australian-born generations with British or Celtic origins (including, as one of our U3A members told us, also a lot of ‘Ten Pound Poms’) but language barriers often inhibit older first or even second generation migrants of other ethnic backgrounds from joining groups like U3A even if they have lived here for many years. The challenge for U3A of living in a multicultural society, and creating wider cultural understanding, may be met not so much through recruitment but more about developing relationships with other cultural groups. Examples are a language class relating to a community cultural group of that language, or learning about art, culture and culinary experience by visiting or inviting other ethnic groups to share their experiences and skills. Another example may be to support other groups which value life long learning, such as the Indigenous Literacy Foundation

This leads to the next challenge - the provision of **Fourth Age Learning** - an acknowledgement that by definition life long learning has no end. Peter Laslett referred to the Fourth Age as “*the age of dependence and decrepitude*” – a condition that can affect anyone from middle age onwards, if they have the misfortune to have developed dementia.

But there are many older people who have led very busy and interesting lives, pursuing a wide range of interests, grand-parenting, growing gardens, writing poems, studying eclectic subjects such as Indian mysticism or African drumming, who reach a stage of life when living in their own homes even with home care is no longer possible, and they are obliged to enter an Aged Care Facility. By definition they become institutionalised and have reached the age of dependence. But this does not automatically mean that they do not continue to have an interest in the outside world, or that their activities need be limited to rounds of bingo, or television re-runs, or community singalongs. It is a misconception to think that if a person is frail or perhaps even bedridden, that they lack interest in learning new things.

Some U3A groups have already taken some of their courses into retirement villages, not for self-supporting residents, but for the benefit of those residents in hostel or care units. One example is Shellharbour U3A, which conducts a monthly discussion group for residents of Warrigal Aged Care. Other U3As make visits to such units to provide musical entertainment for residents, but the real challenge is to provide aged care residents who want it with the opportunity to participate in new learning, to develop new interests, to enable them to engage in discussions, and perhaps to assist them to record their memoirs which can become a valuable history resource for family and for future researchers. Of particular value for older people, especially if suffering from dementia, is access to participation in music, dance and art, as these activities stimulate feelings of happiness and wellbeing, as research by Arts and Health Australia has shown<sup>11</sup>.

The fourth challenge is **E-Learning**, already available through U3A Online, but which could be more extensively used by ‘terrestrial’ U3As especially those in remoter parts of New South Wales. Many older people are of course quite proficient

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<sup>11</sup> See fn.8.

at using the internet and social networking, others are more tentative. Research indicates a clear difference between designing e-learning for older learners as compared to children and young adults who have grown up with online learning systems<sup>12</sup>. Often older users become frustrated and abandon the activity. Nevertheless, learning online as a group rather than individually can make e-learning more effective.

As a starting point, here are some examples of easily accessible practical courses available online. Firstly, the Telstra - Office for Ageing interactive program called Tech Savvy Seniors which provides training for seniors in computers, tablets and smart phones<sup>13</sup>. The second is another interactive program accessible from the Office of Ageing website<sup>14</sup> which provides a course in Planning Ahead Tools to enable planning for future legal, health and asset decisions.

Some individuals will be interested to extend their options through the incoming Mass Open On-line Courses (MOOCs) which are offered through Open2Study (Open Learning Australia)<sup>15</sup> as well as from international universities, without cost and without formal enrolment or assessment. Course materials are available on a range of subjects and can be used as a basis for group discussion. In a sense, MOOCs take us back to Vellas's original concept. The Network's Resource Library has already established a MOOC link with MIT OpenCourseWare (OCW), and there are many other interactive sites which can be accessed by a small group.

E-learning is probably subsidiary to the personal interaction of a U3A group, especially for those who live alone, but it is still a potential opportunity, both for individuals and U3As as more interactive sites become available.

Let us now turn to some other more immediate and practical challenges facing U3As in New South Wales.

Any new U3A will require accommodation. U3As have developed various approaches to accessing venues or acquiring their own accommodation. Larger U3As, in many cases, have been able to consolidate their activities into single venues, often by lobbying councils or politicians, for example facilities or funding such as in the case of use of a former school in Canberra, a former priory in Port Macquarie, a former Seniors Citizens' building in Armidale, and a former church in Shellharbour.<sup>16</sup>

Some U3As have rented facilities and lobby successfully for reduced rentals. Whatever the case, most accommodation is paid for by members' subscriptions unless the U3A has been able to attract grants, gifts or subsidies. The Network Committee is endeavouring to negotiate with the State Government for use of unused or unoccupied Crown land and buildings which may become available, and is also re-visiting the possibility of qualifying for tax deductibility status for gifts and grants now that the definition of a charity has been revised.

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<sup>12</sup> J Niall and R Robson, Paper delivered at World Conference on E-Learning, Washington DC, (ELEARN 2004)

<sup>13</sup> [www.adhc.nsw.gov.au/nsw ageing strategy](http://www.adhc.nsw.gov.au/nsw ageing strategy)

<sup>14</sup> [www.planningaheadtools.com.au](http://www.planningaheadtools.com.au)

<sup>15</sup> [www.open.edu.au/open2study](http://www.open.edu.au/open2study).

<sup>16</sup> Several U3As in Victoria have even been provided with purpose built facilities by Councils.

While we are pleased to be able to report positively on the state of U3A, we are aware that the future of U3As depends on the ability of groups to continue to attract good leaders, and this brings us to the challenge of committee participation and leadership succession in our groups, large or small.

Many voluntary bodies, especially those whose membership is of older people, find it hard to get members to take on committee roles and responsibilities. One U3A with a membership of over 600 recently faced the situation where no one wanted to take on the Presidency – the Vice President had been acting in the capacity for two years but eventually had to stand down. From time to time, other U3As experience the same problem when long-serving officers decide to retire.

Perhaps one factor is to do with size – could it be that as U3As become larger, a dissonance between the membership and the administration of the organisation develops, where individual members connect only with the particular courses they are involved in, and do not see the broader picture, while administrators are not aware of the existence of suitable individual members who might be encouraged to become involved in administration. Newsletters and websites conveying information are not of themselves sufficient communication.

If U3A is to be maintained, and the demand is obviously there, it is important that those joining U3A understand the underlying U3A principles of mutuality and reciprocity and are prepared to contribute as well as enjoy the benefits. Current leaders need to spot the leaders of the future and nurture them and their abilities, to plan for succession. To encourage member participation, we may need to be more flexible in the way our groups operate. For example, by defining administrative roles in less onerous terms, and spreading the work-load more evenly among members, some of whom may not wish to serve formally on a committee but are prepared to help. The main thing is to encourage all members to appreciate the ethos of U3A, to accept that all have a part, however small, to play in the effective operation of their group.

Finally, while U3A is non-political, we need to ensure that policy makers in Government at all levels learn about U3A. The recent national budget discussions tend to reinforce the idea that older Australians are a burden on our economy in their reliance on pensions and the greater part of government spending on health. We need to change this perception, and encourage policy makers to be aware of the value of U3A in maintaining mental and physical health for older people, and in promoting life long learning and preventative health more generally. We also need to remind them of the fact that the highest contribution of volunteer hours in Australia is by seniors aged between 65 and 84 years of age – contributing an economic value of millions of dollars<sup>17</sup>. Make sure that your U3A and its contribution in your community, is known to your local Councillors and Members of Parliament, and seek their support when needed.

So there we have it. We have attempted to examine how the U3A movement, at least in New South Wales, has benefitted from the charter laid down initially by Pierre Vellas and later adapted by Peter Laslett: they provided a sound and robust

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<sup>17</sup> Advisory Panel on the Economic Potential of Older Australians, *Changing Face of Society*, Commonwealth Government 2011, p. 16.

foundation. We have commented on a range of challenges facing our movement. We see these challenges as part of an evolving and dynamic organisation which has to maintain momentum to ensure its long term vitality.

We should strengthen our resolve to attract more people to enhance their learning in their senior years and this in turn can foster their zest for living – as Betty Friedan (1921 – 2006) said:

*"Aging is not lost youth but a new stage of opportunity and strength."*

But remember, the future is not something in the distance but depends on what we create today..

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