

## **U3A Online Incorporated**

### **A Brief History**

#### **Foreword**

The processes and events leading to the funding of U3A Online are not important per se to this report. However, there are a number of misconceptions about how and why the project began, and why different personnel and organisations were involved.

Dorothy Braxton, a member of the Project Management Group, has written this detailed background explanation to ensure that an accurate version of events is available for those who would like it.

#### **Background to U3A Online - A Brief History**

As Australia reached the end of the 20<sup>th</sup> century there was a growing recognition of the demoralising effects of social isolation, particularly within the older sector of the community. Because it is largely invisible, it is an issue that until recently has been given scant attention. Being lonely is not something that many people are prepared to admit to; doing something about it seldom captures the imagination of mainstream society.

One organisation that has been well aware of the impact of this situation is U3A, (the University of the Third Age), an international movement designed to provide low cost, lifelong learning opportunities for retired people in an informal atmosphere. Under one name or another, U3A now has several millions of members around the world - China's Seniors Universities alone boast one million. China's Seniors Universities operate as U3As based on the European model(that is, attached to Universities) whereas in Australia it is the Cambridge model that is used where each U3A is autonomous and self supporting. In Australia around 38 500 (circa 1999) older people regularly participate. No prior qualifications are necessary and no degrees are awarded. Implicit in its philosophy is an understanding of the importance of the social interaction that it provides through courses and discussions involving both Tutors and students. With everyone involved in the U3A movement already in the older age group and, with all of the members being volunteers, many U3As traditionally have a difficult time concentrating their efforts on maintaining activities for their own membership.

Even so, in 1998, a number started looking at what they might do for IYOP, the UN (International year of the Older Person). One such group was U3A ACT in Canberra. Its Management Committee set up several projects, including giving support to a proposal from one of its members to initiate an Internet project designed to provide isolated people, who could not attend an ordinary U3A, with at least some of the advantages available to those in more fortunate circumstances. 'Isolated', in this instance, was seen as including people with disabilities, those who were confined for the most part to their homes as carers and those who were located in places too far from their nearest U3A. From the beginning it was seen as a national project with the potential to involve existing members internationally in an advisory capacity and as course leaders. And because U3As in both Australia and New Zealand have a close working relationship, groups across the Tasman were always regarded as partners.

The Canberra member directly responsible for the proposal, Dorothy Braxton, sought the

cooperation of two other prominent people in the movement, Dr Jack McDonell and Dr Rick Swindell. Dr Jack McDonell of Melbourne is one of the 'founding fathers' of U3A in Australia and one of its most distinguished members. Dr Rick Swindell of Griffith University, Brisbane, has long been associated with the organisation and had already initiated an email discussion group for members called U3A Talk. Both were enthusiastic and could see the direction the venture, called "Isolated Bytes" (IB), could take, eventually, for instance, replacing U3A Talk with an Internet version.

Those three formed a Project Management Group, PMG, and then established a wider Project Reference Group (PRG) with representatives from every State and Territory (Western Australia later withdrew). Three experienced members from New Zealand and the UK were also invited to participate. All provided valuable assistance and advice.

However, nothing was easy. All communication had to be by email and no funding arrangements were initially available. To ask U3As themselves to contribute money to a project, the value of which some might not necessarily appreciate or understand, was seen as counter-productive given that most struggle to keep up with the provision of their own resources. To overcome that situation, in the middle of 1998 an approach was made to Senator Kay Patterson (Vic), then the Federal Government's adviser on IYOP affairs. She gave a positive and enthusiastic response with the result that in July the PMG was approached by EdNA, the Education Network of Australia, to discuss a recommendation it was prepared to make which would give Isolated Bytes a grant of \$120 000.

EdNA, which was located within the Federal Department of Education, Training and Youth Affairs, is the prestigious Internet program supported by all State and Territory governments and by the Commonwealth of Australia. Its staff recognised the need to promote both an awareness and use of the Internet by older Australians and to encourage them to make further use of its almost unlimited educational resources.

They saw the U3A project as a vehicle for doing that. For its part, the U3A team was more than happy to be associated with such a network. EdNA drew up a policy statement that considerably expanded the original IB concept but was one which ideally suited the longer term thinking of those members of U3A who saw the Internet as an essential adjunct to its programs.

The PMG was invited to come up with a proposal which incorporated the policy 'deliverables' and the IB course elements.

There was, however, a major constraint. Until the recommendation received the approval of the Minister for Education, (and there was no certainty of that), the discussions were to remain confidential to the three members of the PMG.

The new concept was undoubtedly exciting and opened up many new possibilities for the target audiences but it would also have to be said that the three members who comprised the PMG knew they had on their hands a totally new dimension to deal with. Physically, they were widely separated so could not get together to discuss matters. It would be true to say they went into it with little more than a great deal of optimism and a belief in what they were trying to achieve. They had to rely on telephone conversations and emails, and the goodwill of their own U3As and Griffith University, to meet some of those costs.

## **Project Funding**

EdNA rightly asked how U3A could manage the finances of such a proposal. With no national incorporated U3A body, the IB program had been devised by a group of enthusiastic individuals thinking along very modest lines, limited in its first stages only to providing online courses and social interaction via email discussions. To overcome issues which they could see would arise, the team, with EdNA's agreement, turned to ALA, Adult Learning Australia Inc., the peak body in Australia for Adult and Community Education which strongly supports Third Age learning, and sought its partnership.

ALA's Executive Director, then Dr Alastair Crombie, willingly agreed to help and both he and ALA's Business Manager, Mary Hannan, came onto the PMG. (Following Dr Crombie's resignation from ALA in January 1999, his place was taken by his successor at ALA, Tony Brown.)

For the original three PMG members it was a hectic and worrying 10 weeks with the knowledge that a Federal election was about to be called any time. If that happened before Ministerial approval was received, the project could have been shelved.

Because of the confidentiality agreement, the PMG could not consult with its advisory team (the PRG), so its members had to design among themselves an agreement which was appropriate for the interests of both EdNA and IB. Eventually, in early September, just hours before the Government went into election mode, formal approval was received in a letter from the then Minister for Education, Senator Chris Ellison.

Soon afterwards it seemed obvious that a new name to better describe the enlarged concept was needed and with due regard to simplicity, those involved settled on the new title of U3A Online, with the course aspect retaining the original Isolated Bytes name for identification purposes.

All these points become important in any review of the project because, despite being circulated about it, it was clear that in the early stages some of the Australian U3A membership did not understand the project. Among the country's 128 U3As a minority criticised it for not consulting more widely, despite the wide representation it actually had.

Some U3As were reluctant to become involved because they felt they 'did not have the resources to participate'. They failed to appreciate that the only thing they were being asked to do was to help promote the scheme where that was possible. What misunderstandings there have been have almost certainly occurred because many U3As still do not have offices of their own, let alone Internet connected ones, and computer literacy remains, in many instances, a matter for their individual members. It also needs to be understood that the majority of members in 1998 were not computer users. Now, however, U3A computer courses are among the most eagerly sought after as a generation realises it is missing out on an important and useful technological advance. Fortunately, today most U3As now see the advantages of U3A Online, and understand better what it is trying to achieve.

## **The Project**

With the grant assured, Sandra Duke was appointed as a paid coordinator to run the program on a day-to-day basis, working out of the ALA office in Canberra.

Effectively she has been the linchpin, integrating all the different people and components of the project (nationally and internationally) and, in particular, handling all the applications for membership. She may not have been able to offer face-to-face communication with the IB members, but she does do it screen-to-screen, providing a nice link for many who 'talk' about their isolation and loneliness and their interests with her.

Two U3A course leaders, George Chippendale from Canberra, and Keith Pearson from Melbourne, volunteered to spend the many hours needed to rewrite and teach their normal classes in what, for both, was a new electronic format. Theirs were to be the two pilot courses to be presented and evaluated during the project time frame.

Others across Australia, NZ and the UK also began work on more courses to be offered after the trial period was over.

The project team had to embark on a steep learning curve. No one had any knowledge of how to organise virtual courses for older people who might well be quite unfamiliar with using the Internet. International universities and other organisations had been providing online courses for some years, mostly as commercial propositions, but a comprehensive search of the literature, and email exchanges with academics overseas, did not reveal anything which mirrored the U3A proposal.

To help with this aspect, the assistance of the Faculty of Education at the University of Canberra was sought. The Vice Chancellor, Professor Don Aitkin, willingly backed the venture. Further support came from the Canberra-based Internet enterprise, Chirp Web Design, which was appointed to host the website. Its Managing Director, Duncan Crombie, has taken a close personal interest in U3A Online, often stepping in to help members who have problems and offering advice to the PMG as to how best to approach various aspects of the program.

Within a few weeks of opening the IB course membership in late February 1999, isolated people from across the country were expressing their desire to participate. By the beginning of June (when this foreword was written), and with still a month of the DETYA contract to go, around 150 had enrolled. They came from small towns, from the cities and from rural areas. Two are from King Island in Bass Strait. Remote U3As, which don't have access to the resources of the bigger groups in towns and cities, have asked to join as a group and already one retirement village has been enrolled with enquiries from others. Some U3As have asked if their members could participate in a particular course available online but which they themselves could not offer. The demand is increasing on a daily basis as isolated people say U3A Online participation is 'making a difference' to their lives.

Other groups in Europe and Canada are now known to be establishing similar Internet projects but U3A Online has been given to understand it still retains the cutting edge.

Dorothy Braxton  
3 June 1999

(The names of all persons directly connected with the project can be found in the Acknowledgements.)

U3A Online Project

(September 1998 - June 1999)

### **Acknowledgements**

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### **Project Manager:**

Adult Learning Australia

### **Dramatis personae**

#### **Project Management Group:**

Dorothy Braxton (U3A ACT)  
Tony Brown (ALA)  
Jack McDonell (U3A VIC)  
Mary Hannan (ALA)  
Rick Swindell (Griffith University, QLD)  
Alastair Crombie (former Executive Director, ALA)  
Project Co-ordinator: Sandra Duke

#### **Project Reference Group (U3A members)**

Dorothy Braxton (Canberra, ACT)  
Barbara Foley (Brisbane, QLD)  
Jack McDonell (U3A Network, VIC)  
Marcia Nicholl (Adelaide, SA)  
Rick Swindell (Griffith University,  
Fred Thornett (Hobart, TAS)  
Les Betts (Fern Tree Gully, VIC)  
Norman Knight (Sydney, NSW)  
Howell Jones (Cairns, QLD)  
Gwen Banks (U3A Council NSW)  
Bob Bettison (Franklin, NZ)  
Allan Thompson (Darwin, NT)  
Aldren Simmons (Christchurch, NZ)  
Jean Thompson (Reading, UK)  
Tom Holloway (Warwick, UK)

#### **Course Writers:**

George Chippendale Botany for Knowledge and Enjoyment  
Keith Pearson Writing Family History  
Ian Wilson Continents on the Move  
Mel Davies The Life and Times of Henry Lawson  
Jean Thompson Design for Living  
George & Lisl Singer Jogging the Brain  
Margaret Allen Comparative Religions  
Robert Comrie Genealogy  
Byron Soulsby Introduction to Astronomy

**Project Evaluation:**

Rick Swindell and Ken Vassella (Griffith University)  
Peter Grimbeek (Griffith University) – Report consultant

**Electronic Course Preparation:**

Prof. Don Aitkin, Vice Chancellor, University of Canberra,  
Associate Prof. Barbara Chambers and Dr Noel Vanzetti and  
their team at the University of Canberra

**Editorial Assistance:**

Bess Flores - Adelaide

**Technology:**

Duncan Crombie and his team at CHIRP Web Design

The combined talents of all the above have contributed to the successful fruition of this project, and their involvement and support is gratefully acknowledged.

Dorothy Braxton    ACT 1999

**U3AOL History. Part 2****Preface (by Dorothy Braxton)**

From its outset, one of the intentions of U3A Online was to carry out research about older people and other ventures which pertain to U3AOL itself. It's not too surprising then, that the first of such projects was designed to take a look at ourselves after our first year or so of operation. The study, dated June 1999, was called *Older Learners Online* with the sub title: *An evaluation of Internet Courses for Isolated Older People*. It was produced by Dr Rick Swindell, one of the three founding Directors of U3AOL and Ken Vasella, both then on the staff of Griffith University.

Now, a decade on, when we are trying to make an effort to archive material we've produced, it's been suggested I should further expand that foreword, this time in a more personalised form, so that in future anyone delving into our history can see a little more clearly how and why we came into being and at least some of what was involved in its establishment. At the time of writing, May/June 2009, it's hoped others will make a contribution to this document for posterity. I'll be writing to some of the founding members for additional material about our earliest days but it's equally important that those who have come into the team at other stages should put on paper how things evolved. Those using/reading this material should also go to the publication referred to above: *An evaluation of Internet Courses for Isolated Older People*, especially to the material written by Jack and by Rick on the courses, and another publication called *Ginger's Story* in which early participants wrote of their experiences with the courses.

(With a first decade already behind us, it's only 40 years until someone writes a book about our 50<sup>th</sup> anniversary. Well, 21 years anyway. U3As are good at producing such efforts. I have just been one of a small group who have compiled and written the 21<sup>st</sup> anniversary history of U3A ACT, where this project had its birth pangs, and I am all too well aware of how difficult it is to go back and to correctly record how that U3A came into existence. You have to rely on the very few founding members still alive and the sometimes fallible memories of others who came on the scene a little later.)

I emailed a representative group interested in this U3AOL production and asked how they wanted it written - the style you use for an academic publication or the kind you use for one's 'memoirs.' Everyone replied to make it personal and non-academic.

I've purposely gone into some considerable detail about the way things were in the '90s because today it will be difficult for others who are from a younger generation to realise that this was all started at a time when very few people of any age, let alone 'oldies,' had home computers. George Williams, of Canberra, who has played such a vital role in both U3A ACT and U3AOL's development, was only the second member of U3A ACT's committee to have one. That was not until 1994, in time to do the administrative work for the Canberra conference the following year. I bought mine I think in 1995, maybe it was '94. We all have stories as to why initially people couldn't see the need for such things. Good old typewriters were doing the job perfectly well!

Given that we were in an era when that was the situation, it's difficult to appreciate now that a venture such as U3AOL ever became a reality. Moreover, given that later we would claim we were possibly five years ahead of our time, it's even more miraculous that we stayed alive over that first half decade of our existence.

We also look back and still find it hard to believe that four Federal politicians, the late Senator Jeannie Ferris, Government Whip in the Senate, Senator Kay Patterson, then the Government's Adviser on IYOP, the International Year of the Older Person, Senator Chris Ellison, the then Minister for Education, and Senator Kate Lundy, a Shadow Minister in the Labor Opposition, all had faith in us. All were responsible for getting us our first grant of \$120,000...the first three *as* Government senators and Kate who backed us all the way.

A year later, the Hon. Bronwyn Bishop MP, as Minister for Health and Aged Care, became an enthusiastic supporter and through her, and with a great deal of help from her staff, secured our next two grants. There were ministerial changes along the way, with those who held the portfolio after Bronwyn showing very little interest, until the Hon. Julie Bishop came on the scene. By the time she became the Minister for Aged Care we were self sufficient but she did kindly agree to fly to Brisbane to launch our book, *A Voice Worth Listening To*, in 2006 at a function hosted by the Vice Chancellor of Griffith University, She too believed in what we were doing.

It may be difficult for members of ordinary U3As to appreciate why we needed the support of such people when most U3As tend to shy away from government help, but U3AOL would never have got off the ground without their assistance. Incidentally, we were always told by the Department of Health and Ageing, to say that 'the Australian Government *funded* the project.' It was not protocol to say they *supported* us!

Conversely Griffith University, which has been so involved almost from the beginning as part of its Community Service Program, and which since 2002 has hosted the program free of charge on its server, has never objected to the former word.

It's most important in writing any publication from this archival material to appreciate the huge number of hours, the physical and mental energy that over the years have gone into the project. It's never ceased to amaze me that a comparatively small group of people, almost all of whom were - or still are - already dedicated to an ordinary USA somewhere, would then turn round and help to develop this venture which has always had as its primary aim the idea of allowing people who are isolated in the community some of the advantages the rest of us have enjoyed as members of that ordinary U3A.

What follows here then is a combination of that original background material and the additional information we've added. In writing their own recollections different people will have different memories as things affected them. That's just human nature. We can only hope that someone delving into this archival material will enjoy the stories and produce their own document for posterity

**Dorothy Braxton Founding Director**

## Why?

Though not without a few difficulties, it had worked well and the participants enjoyed the experience both of having something to stimulate their brains and the social interaction. But there was money for this to be held for only a limited number of weeks. Then it had to come to an end.

Fair enough. No one had promised the participants it would go on forever but you could tell from their responses they didn't want it to stop. Did they feel let down? That they might perhaps have just been part of an experiment? Certainly Rick had not wanted them to feel that way. For some reason I'd been a bit worried about it. To use an animal analogy, they'd been offered a saucer of cream, enjoyed it and they wanted more.

Another idea grew from an outcome of the 1995 Canberra U3A conference. A group of us, including Jack, Rick, George and I, had discussed ways of bringing members across the country together by instituting a national newsletter...U3A in this country has never had a national umbrella body. Before we could take that beyond the first basic steps, we realised that we were entering the age of technology. Should we be thinking about an electronic newsletter? True, the technology had been around for a long time but nothing like it would soon develop as a personal tool.

As a third thing, older people were now slowly beginning to think in terms of email and the Internet. Only a handful had computers in their homes - Federal Government stats claim that even today, 2009, only one in five senior Australians uses the Internet. For all that, we could see what was coming...well, as much as anyone could foretell IT more than a few months ahead.

It happened that U3A ACT was one of the first, if not *the* first, U3A in Australia to introduce computing into their management systems. We were approaching our plan to stage a conference in Canberra in 1995. We knew how much work would be involved and decided that we would have to manage much of the logistic stuff by computer. That was a big leap forward: in 1994 people were still saying, 'Oldies will never cope with the technology.' Nevertheless, we bought an Osborne machine and one of our committee members, George Williams, taught himself how to use it, beginning by learning how to turn the switch on and coping with the basics. (This was not to say that a few of our members didn't have home computers: some did but only one on the committee was then using one and that was at home.)

The use of that first machine, and what George could do with it, taught us a lot and, in its own way, was one of those steps that led to U3AOL. I had bought my own machine and learnt something of the intricacies of IT which was why my own thoughts were leaning that way. As well, George and I, both as members of the staff of CSIRO which had developed computer technology in Australia, were awake to some of its possibilities.

But to go back to 1995-96: Rick realised that a conventional newspaper could be better replaced with an electronic email version called USA Talk. Members could join this free of charge and exchange information and news items. It was well received, attracted many hundreds of participants in Australia, New Zealand and the UK,

Somehow with that IYOP invitation, it was a case of one thing leading to another: could we somehow use computers for a virtual U3A? Why not bring all those things together in a project whereby we could offer isolated older people U3A type courses online? But not just for anyone who could attend their own local U3A. We could limit it to those who, isolated by disabilities, or by geographic or social circumstances, could not become ordinary members. (While initially our thoughts



were for seniors, we later extended our 'isolated' criteria to younger people with disabilities as well. Age would not be a barrier in such situations.)

I was thinking of those who lived too far away from a U3A and those who had had to give up being members because of their transport difficulties. At the time we had a number of members in U3A ACT who told us they could no longer attend courses because they could no longer drive and buses, the only form of public transport in the city, were for the most part, impractical. (Try using a bus if you're in a wheelchair, use a 'walker,' or simply can't manage the steep steps. Or standing in a crowded vehicle.)

There were also those who were carers: A few weeks later a member of the Carers' Association in Canberra would remind me that carers could become as isolated as anyone because they could not leave those they were looking after. 'Some days, I was told, 'they go crazy just stuck at home with nothing to exercise their brains.'

If course leaders could prepare course material and be prepared to help participants use the material with assistance in a discussion group, would that establish the all-important social interaction? I was the first to admit I didn't have sufficient technical knowledge to know how to bring it about but there would be others who could do so. Could we ask the various U3As to take an interest in isolated members who lived in their region...ie invite them to special occasions like the Christmas party or to visit a group if they happened to be in the town. (That idea did not ever get off the ground.)

It also so happened that while all this was going round in my head, one of the most prominent members of the international movement, Jean Thompson, arrived in Australia on a visit from the UK. We'd been friends for a time and while she was in Canberra she stayed with me. I decided to be brave and ask her if she thought such an idea might work. To my delight, Jean was enthusiastic. And because I very much valued her opinion, I was beginning to get the courage to take it further.

At that time I hadn't seriously thought of it being an international effort, with the exception of a trans-Tasman input, but I did see it as being Australia-wide, not just an ACT project...Canberra might well have its share of lonely older people and those who could no longer attend our U3A, but in terms of 'geographic isolation' I was thinking first of all of the rural regions.

As for New Zealand, U3As in both countries had long collaborated for conferences and seminars and it was automatic to think of including people across the Tasman. That was probably a natural corollary anyway...I was a Kiwi myself. So for that matter was Rick Swindell.

I tried to put some ideas on paper before approaching the U3A ACT Management Committee and one concerned funding. I had no idea what such a project might cost but I knew it was not something that U3A ACT could meet on its own and I had a feeling it would not necessarily be a popular suggestion to devote precious funds to such an idea. I knew too, that if we went beyond the borders of the ACT it would need an Australian Government grant. That's the way things work in this country. States and Territories normally will fund only those programs established within their own borders.

Such grants involve considerable accounting procedures and I wanted to anticipate at least the most obvious questions as to its administration. It would be too much to ask our own treasurer, Pat Williams, (George's wife) to take on such a task as well as her already heavy workload - even back then U3A ACT was one of the bigger groups in the country - so I was ready to say we would not put more on her shoulders.

By our October committee meeting I tentatively broached the subject, introducing it by outlining it as an IYOP endeavour. I can't say that the suggestion was greeted with overwhelming enthusiasm. Lukewarm might be the best description. Given how few knew anything about computers that was about what I might have expected.

The committee didn't say, 'Forget it,' but rather it was left to me to come up with a firmer proposal. I couldn't blame them. After all, so far it was pretty 'airy-fairy' stuff. I said I'd get back to them when I knew more. The November meeting had other matters on the agenda and I left it alone. I also still had to talk to some of my colleagues outside Canberra before going any further. Christmas was upon us and U3A members look forward to having a break...you pick your time to introduce innovative ideas.

The person I most wanted to discuss the idea with was Melbourne's Dr Jack McDonnell AM, a stalwart of Victoria's U3As and regarded as the most knowledgeable person nationally when it came to U3A affairs. Jack was one of the four people who had introduced U3A into Australia in 1984 and for years arguably had done more for the movement here than had anyone else. He was a good friend and I had the utmost respect for his views. I felt if he agreed with such a proposal, with his help we could make it work. If he said no, then I'd proceed no further. If he was supportive, I'd be game enough then to put it to Rick Swindell in Brisbane, whose opinion and experience I also respected.

Jack was then a member of the board of directors of ALA, Adult Learning Australia, Australia's peak body for adult and community education, and I knew he would be in Canberra for a meeting of theirs at the end of January 1998. I arranged to meet him and told him what I was thinking about. He liked the idea. I immediately felt on much safer ground.

That left Rick. I rang him, explained my thoughts and told him about Jack and Jean. He too readily saw its possibilities. He immediately thought of his trial of courses by that teleconferencing program and there was U3A Talk which he'd instituted. Like Jack and me, he saw this as taking a step forward, albeit a huge leap, but possible.

It's difficult now, 11 years down the track, for us to recall the exact chronological order of things. While Jack and I would both write material to add to the 1998 evaluation study "carried out by Rick and Ken Vasella of Griffith University, looking back on it, we obviously condensed our efforts. Today, when you want to get it right for future historians, it demonstrates one of the pitfalls of any such project. Does it matter if 25 years later you don't get it precisely correct? The walls of Jericho won't fall down if that doesn't happen but no journalist or researcher wants things half right.

What we do know was that the three of us started emailing and phoning each other with ideas for a virtual form of U3A. We wondered if anyone else was doing something similar so Rick and Ken did a world-wide computer search making use of GU's facilities. Some universities had introduced online course material for students and we knew that in the US there was an online program to teach computing to seniors but nowhere was there anything such as we were proposing, a project run entirely by older volunteers for those who were isolated but who already had a knowledge of computing and access to a computer. We were sailing into unknown waters. If we went ahead we would become the world's first virtual U3A, or as Rick was to put it, "a U3A without walls.'

We would need a name and came up with *Isolated Bytes*. True, later we would expand the criteria for participation to U3A members or groups and older people with no U3A affiliation, but initially, our interest lay solely in catering for those people whose social or physical situation didn't allow them to enjoy the advantages of being a member of an ordinary U3A.

Importantly too, it should be mentioned that while our primary objective was always to be our isolated participants, we quickly realised we could incorporate the Directory of U3As in Australia and New Zealand that Rick had been producing in hard copy for several years, as well as things such as the news items we had first thought of including in a national newsletter. In reality, We began to see that the website could become as useful as our imagination could be challenged.

## **Broaching the subject**

U3As traditionally close down for the Christmas break and most don't get back to work until sometime in February. U3A ACT's first committee meeting for 1998 was at the end of that month and it was then I took courage in my hands and told them of the developments since the October meeting. While the project would initially be seen as something coming from Canberra as part of U3A ACT's input to IYOP, essentially by then the three of us, Jack, Rick and I, were seeing it as a trans Tasman venture. That seemed to be accepted well enough and from that point on, U3A ACT got on with doing other things for IYOP, leaving Isolated Bytes to the three of us. That decision coincided with the end of my three year tenure as President in Canberra. While I remained a member of the committee for another year, at least I had more time to get on with what was rapidly becoming an exciting new project.

There were two immediate steps: We needed a management structure and we needed a government grant to get the effort off the ground. We decided that initially the three of us would form what we called the Project Management Committee, PMG, but we knew we would need volunteers from other U3As to make it a national project and to help with its establishment. We would call this second group the PRG, Project Reference Group.

To ensure a wide representation, we sought a volunteer from each major U3A in each state and territory and from New Zealand, with an additional person from New South Wales and FNQ, far north Queensland, two very big states. We could also see that the technology allowed us to think outside the square, that the computer age dissolved international boundaries. Knowing we needed all the help we could get, we quickly invited Jean Thompson and Tom Holloway from the UK to join the PRG. Tom knew more about computers than any of us, having worked professionally in that field for many years while Jean knew more about the U3A movement internationally as well as in the UK than almost anyone else. Their input could be incalculable. Over the years both were to make a big contribution, with Jean additionally becoming one of the earliest course leaders.

For the others, we wrote to the Presidents of U3As in the capital cities, to Cairns and to the NSW Network outlining the venture and asking them to nominate a representative.

We were fortunate: there was strong support from most people we wrote to. The veteran Colin Lawson in Adelaide immediately expressed his interest and his willingness to help and asked Marcia Nicholl of Adelaide to help. Howell Jones from Cairns was equally enthusiastic and went on to help, not only in an administrative capacity but he also became a course leader until his health failed. Allan Thompson, then living in Darwin, saw the benefit of such a project and remained a valuable member of the PRG for years and as of 2009 still serves as our treasurer. Barbara Foley from Brisbane was a real strength in the early days.

Like Allan, Gwen Banks from Shoalhaven in New South Wales, saw the value of Internet courses for isolated people. She joined the original PRG, in 2000 took over as President of the CoM, (Committee of Management) from 2001..and with the exception of one break, has been with us since the project's inception.

In New Zealand I approached another good friend, Dr John Stewart of Auckland, who had introduced U3A into that country. He too, was all for it and then introduced me to Bob Bettison, President of the Franklin U3A in Auckland, who had no hesitation about coming on board. He was a most useful member for several years.

## **Government grant**

Having decided to proceed, our next move was to get funding. As a long time science journalist working with CSIRO, I trusted the old maxim: 'It's not what you know but who you know.' Living in Canberra too, I had a reasonable knowledge of how things 'worked' within Australian Government circles.

I had two good, long-standing friends in the House: one the late Senator Jeannie Ferris,

then the Senate Whip, and also formerly of CSIRO, and Senator Kate Lundy, a shadow Minister in the then Labor Opposition. In both instances, our friendship had nothing to do with politics. It just made access to them easy in their political capacity and they would go on to believe in what we were trying to do. Both would also become members of our External Advisory Group when that was established and for almost a decade they were to help us in many different ways

With the Liberal National Coalition then in power, I knew it would have to be Jeannie to whom we would first go for help. I arranged to meet her and explain what we were trying to do. She was greatly taken with the concept, especially as it would be an IYOP one. She also immediately saw how it could impact on 'isolated' people and what was so useful, she understood the technology that would be involved.

'I've just come down from Thredbo where we had a Liberal Party meeting,' she said. 'I travelled in the bus with Senator Kay Patterson who's been appointed the Government's adviser on IYOP affairs. She's the best person for you to talk to.'

Jeannie promised to set up a meeting for me a day or two later with Kay and herself. I learned that Kay was just back from a UN meeting in New York and was keen to set IYOP matters in train in Australia. Things were moving faster than I'd dreamed possible! Before that meeting I'd discussed with Rick and Jack what would be a reasonable sum to ask for but none of us really knew what such a program would cost. We just knew we would have to have a website on which to host the program, that we would need a webmaster and that we would automatically have administrative expenses.

We decided it would be reasonable to ask for between \$12 000 and \$13 000. How wrong could we be!

We were extremely fortunate. Like Jeannie and Kate Lundy, Kay Patterson proved to be a delightful person to work with. Straight away she saw the implications of such a project, seeing it as an innovative way to get isolated older people involved in something that would open new doors for them, that it could involve rural and regional people which, at that time, was politically important. It would also introduce older people to the Internet. 'Leave it with me,' she said. 'I'll talk to my colleagues and in due course you should hear from them.'

She was, of course, as good as her word and throughout the time she remained in Parliament, she continued to support us.

By this time, the middle of 1998, and with the help of the PRG, we were starting to see how things might work. From the outset we were definite about one aspect: we were not going to teach people how to use a computer. It was a 'given' that they would already be familiar with them, either because they owned one or had access to one through a library or other community facility. With a few things falling into place we had several important things to do...one was to consider how we would establish a website which meant first getting an Internet provider and website, and then deciding on the first two trial courses.

The main thing though, was the funding. It was July before we were approached by DETYA, the then Federal Department of Education, Training and Youth Affairs, with which we would have an on again, off again relationship as required. At first we wondered why DETYA but it transpired Kay, while finding several of her Ministerial colleagues were enthusiastic about the project, decided that it should best be handled by Senator Chris Ellison, then the Minister for Education. In the way such funding is administered this meant for the purposes of any grant we would now be dealing with his department.

It was in July that we received the news that left us breathless...no other word, unless you say 'stunned,' described our feelings. Coming home from a meeting I had a message on my answer phone: ring Rick. His was the other phone number DETYA had besides mine. His voice sounded excited and he first wanted to know if I had I heard from the department. 'They've been trying to reach you,' he said. And then he dropped the news: 'They want to know if we could use \$120 000!'

We were both shell-shocked. In our wildest dreams we hadn't come up with that sort of money. In our ignorance of what such programs could cost, we'd modestly talked about that \$13 000.

I immediately rang the Department and the news was confirmed. There was one condition, however, one major - and vital - constraint. Until the recommendation received the formal approval of the Minister (and they pointed out there was no certainty of that) discussions were to remain strictly confidential to we three members of the PMG and the departmental group we were dealing with.

That may need some explaining: When such a grant is under consideration, it was customary then - and probably still is - for there to be discussions between the Minister's Office and the department concerned. If both agree, the department then sends a formal letter to the Minister recommending the grant be approved but nothing is final until the Minister puts a signature on the all-important piece of paper. The following day I went into the department's office to discuss this with the group EdNA whose responsibility it would be to liaise with us.

It transpired DETYA saw the U3A project as a vehicle which met their own criteria. They then drew up a policy that considerably expanded the original *Isolated Bytes* (IB as we came to know it). We were happy to agree to it since it met our longer term thinking: we already felt confident that in a fairly short time the Internet was going to become an essential adjunct to all U3A programs and administration.

We were then asked to come up with a proposal for what they called 'deliverables' and IB course elements. Their staff was superb and for the next year or so we had a great relationship with them but in those early weeks the confidentiality agreement did put terrific pressure on us. Here we were, trying to establish a \$120 000 project, needing to talk to our PRG members about it all but not allowed to discuss how we were going to proceed with getting it off the ground.

Before too long the three of us agreed we simply had to have some advice and assistance and sought leave from the department to approach a colleague, Dr Alastair Crombie, then Executive Director of ALA, Adult Learning Australia, the peak body for adult and community education. Their headquarters were then located in Canberra in a disused part of the Cook primary school. ALA strongly supported Third Age learning and we felt it would be appropriate to ask them if they would become our partners. The three of us already had an association with ALA - Jack was a member of its Board of Directors while over the years Rick and I had worked with them in different ways. DETYA agreed but on the condition that until it was confirmed by the Minister, only Alastair was to be involved. He was to be included in the confidentiality agreement.

One of the first benefits of having Alastair on board came about when one day I received in the mail a formal agreement from the department. Opening it I was horrified to see it was a 30-page legal document. My first thought was: we need a lawyer! Where did we get someone who could interpret the document in plain English and who would not cost the earth? I took some deep breaths and drove over to see Alastair. He took one look at the papers and to my undying relief said: 'Leave it with me. I've dealt with lots of these. What's here is just a standard government document. The only pages that matter are 28-30 and they're not complicated.'

### **Adult Learning Australia**

Before that, DETYA by this time had rightly asked us how U3A would manage the finances of such a project. We had had to explain that we had no national body, that *IB* had been established by a small group of individuals thinking along very modest lines, limited at that stage to providing some trial online courses and starting some social interaction among the participants. We didn't feel we could ask our individual U3As to take on such a responsibility so up to the point of actually getting the grant, the three of us had been meeting the costs involved ourselves. Getting the grant solved our early administration costs and later, when the trial period settled down and we'd worked out many of the administrative details with ALA, we were able to

gain the services of ALA's business manager, Mary Hannan. Both she and Alastair would go on to be invaluable partners and members of the PMG as did Tony Brown who took over from Alastair when he retired early in 1999.

### **Ramifications**

But to go back to the time of the confidentiality agreement: with the PMG unable to discuss or consult in any way with our embryonic Project Reference Group, it may well have been this that contributed to some of the animosity we were later to meet from the Sydney U3A. We believed they could never appreciate our situation but to have broken our agreement would certainly have cost us the funding.

Those 10 weeks while we waited for the Minister to sign the letter were hectic and worrying, exacerbated by the knowledge that the Government was likely to call an election any time. If that happened before ministerial approval was granted, the project could well have been shelved. There was no certainty that the Coalition would be returned and even if it were, that Chris Ellison would be re-elected and then returned to his education portfolio.

In the meantime we three and the DETYA group we were working with continued to design among ourselves an agreement which was appropriate for our mutual interests. Then, in September, John Howard, the then Prime Minister, announced the election would be held. Our hearts were in our mouths because once the Government goes into election mode, ministers cannot approve any further funding from the end of business that day. Senator Ellison signed the letter that afternoon at 5pm, we were told! We had our \$120 000.

The Minister was true to his word, both parties signed the document and history was made. We were finally free to tell our PRG friends the great news and explain to them the need for the secrecy. Fortunately, all were wise people and were understanding of our situation.

By this time the PMG, as it sank in that we had on our hands a project worth \$120 000, also realised that, because of the Government's regulations, such grants had to be spent within the current financial year. That meant in reality we had to spend the \$120 000 by 30 June 1999, just nine months away!

We knew we urgently needed more than the voluntary assistance of our scattered colleagues to get the project off the ground. Ours might be a virtual U3A but we still had to have a base in the real world. ALA suggested we take over a small area in their own premises at Cook. The 'office,' we should add, was in reality a small area in one of the old classrooms with a desk, a bookcase and a filing cabinet. (We paid service fees for the space and for the work ALA provided)

Of course, it could be asked, why did the ACT become our headquarters? Jack lived in Melbourne, Rick in Brisbane and I was in Canberra. So too, was ALA, the Department and the Government and at that time we needed to work with both those institutions. Canberra simply seemed logical and remained so for the next two or three years.

Here we make mention of the ALA Awards with this extract from a 2002 ALA publication:

### ***“ALA AWARDS***

*Adult Learning Australia, the peak national body for adult and community education, makes three awards annually, recognising excellence in adult education. One of these is for Adult Education Program of the Year, described as “a tribute to outstanding work in program development, implementation and evaluation”.*

*For 2001, ALA made two Outstanding Program Awards. One went to “Filling The Gaps”, a*

*collaborative project in Koorda, a small rural town in the wheat belt of Western Australia.”*

ALA's report of these two awards continues thus:

*“The other Outstanding Program Award for 2001 goes to U3A Online Resources. U3A Online is a novel internet-based program that offers a variety of adult education courses and resources, all developed by older volunteers for older learners. U3A Online operates in the same spirit as a conventional U3A. Volunteers develop and teach all the courses. As well, a team of volunteers, who oversee the many facets of the program, carries out all the management. The only paid person is the coordinator. This is the first program of its kind for isolated older people.*

*“The program has two main targets. The first target group is older people who are isolated by distance or circumstance (such as illness or being a caregiver) and, as a consequence, cannot take part in face-to-face education activities. One volunteer teaches her course from the UK, clearly demonstrating the potential of this program to harness the talents of older people regardless of their location.*

*“The second target group comprises the 50 000 members of the 140 autonomous U3A groups in Australia and 43 groups in New Zealand. Until U3A Online there was no systematic, inexpensive way for U3As in either country to communicate widely with other groups, or to learn about adult education matters of interest to older adults, nationally or internationally. As a free service to all U3A members, U3A Online provides a directory of addresses, information about conferences and courses, and links to U3As all around the world and other resources. U3A members may also take part in all the online courses for a nominal annual membership fee of \$12.”*

*Adult Learning Australia, the peak national body for adult and community education, makes three awards annually, recognising excellence in adult education. One of these is for Adult Education Program of the Year, described as “a tribute to outstanding work in program development, implementation and evaluation”.*

## **The Coordinators**

It didn't take us long to appreciate that with what was to us a huge project suddenly on our hands, there was no way we could handle everything on our own, especially as we were so geographically separated. We needed some administrative assistance and were fortunate to have recommended to us an enthusiastic young Canberra woman, Sandra Duke. She agreed to come and work for us but stipulated it could be for no longer than six months. We felt that would help us get established and develop some sort of routine for enrolling participants in courses and working out how course leaders and 'subscribers,' as we were to call the participant could best liaise..

This idea of employing someone was something that raised a few eyebrows in some quarters: U3As prided themselves on being administered entirely by volunteers, but the whole concept of U3AOL was different. It should be noted that it was only people outside the U3A movement who ever received any payment. It has always remained so. Over later years we have had to employ people to provide specific IT services but no U3A member has ever received any kind of remuneration.

Once installed in her 'office,' effectively Sandra became our linchpin, integrating all the different people and components of the project, nationally and internationally, and in particular, handling all the applications for the courses. True, she couldn't do

it face-to-face with the participants but she did do it 'screen-to-screen' in a friendly and welcoming manner, providing the link between those who talked with her not only about the courses but also about their interests and so often, their isolation and loneliness. We were extremely fortunate to have a person who developed such an empathetic role with those first participants. It made all the difference because initially we were relying very much on person-to-person talk for members,

When Sandra's six months were up John Preston became our coordinator and when he resigned we were fortunate to get Phil Robson, a former public servant who, like Sandra, proved to be someone with that all-important empathy. We lost him when our funding came to an end and we could no longer afford to employ him.

With no option but to revert to voluntary help we were fortunate that a young disabled Brisbane woman, Kate Russell, offered to join the team. Kate has remained with us off and on, at times being a course leader, and has made a valuable contribution to the project in various ways over its 10 years or so existence. Kate's specialty course was Autobiography and Journaling and she acted as course leader on several occasions when her health permitted her to do so.

At one of the times when she had to resign for health reasons, Maggie Magafakis (U3A Brisbane) volunteered to take on that task, bringing with her a new dimension. Maggie became our administrator from 2001 - 2003 The number of subscribers, as we called the course participants, was increasing solidly and the role of coordinator became that of project administrator..

### **Chirp Web Design**

It's hard, 10 years down the track, to know exactly the sequence of all the events of those first few months -most were overlapping anyway. A serious house fire destroyed all my early papers, a big loss, at least for me because it has meant that many of the records I had were irretrievably lost. One of the first things we had to do was to have a website and an ISP. The first course leaders had to be found and their material then written. Moreover, that material had to be produced in HTML text that could be put up on a website...the technicalities to this day remain a mystery to me but we were all learning those aspects of the project that were essential to each person. This was not just a world first for older people learning via a computer: it was a first for the team organising such a project.

One vital development at this time was making contact with ALA's webmaster, Duncan Crombie, whose Internet business, Chirp Web Design, was also located in Canberra. Duncan agreed to provide the service we would need. This was a commercial arrangement but he not only provided us with many hours of extra help and advice, he charged us considerably less than normal commercial rates. We also knew he frequently stepped in to help our new subscribers find their way around the courses...it needs to be remembered that none of them had ever done anything like this before and all were of an older age group where it might be expected that it could take time to learn 'new tricks.' None of us could speak highly enough of Duncan.

It's worth mentioning here that, to meet education departmental requirements, Griffith University needed to demonstrate an involvement within the community and offered to host U3AOnline free of charge on its website. The project has been based free of charge on GU's server ever since.. It's true that Chirp transferred its operation to The Netherlands about this time, but the GU offer was too good to pass up..

### **Trial courses**

One of our first endeavours in 1998 was to organise our first two courses. We were extremely fortunate in obtaining our first two course leaders who agreed to be our guinea pigs for writing and presenting our first courses: George Chippendale from U3A ACT in Canberra and Keith Pearson from Melbourne. Looking back, much of our initial success in fact stemmed from the effort those two put into the rapport they established with our



first participants because through the word of mouth those people passed on so our reputation began to grow.

Formerly a scientist with CSIRO's Division of Forest Research, George remains to this day, 2009, one of Australia's most notable botanists and a specialist in particular in eucalypts. For many years he ran courses on botany for pleasure for Canberra USA members, introducing hundreds of people to that scientific endeavour in such a way that they developed not just a whole new interest in the subject but came to be very knowledgeable in it as well. Counting those who joined him on his walks over Black Mountain at the '95 USA conference and in the Australian National Botanic Gardens, where his courses were based, he must have taken thousands on strolls over the area.

In his early online courses George became so enthusiastic about helping his participants that he took off into the bush to gather actual specimens, mounted them and then dispatched them by surface mail to people. Later, when his age and health proved too much to carry on, he allowed us to use his material with another volunteer course leader taking over from him. Keith had run U3A courses on tracing family histories. Our writing family history and tracing people's genealogy remain among our most popular courses to this day.

The first courses went online in February 1999. By this time we had a number of isolated people wanting to participate. We had earlier taken the decision that at no stage was it either desirable or practical to seek any kind of proof about people's isolation eligibility. While they have always received additional benefits for their participation, in preference to those later given to ordinary U3A members, they've only ever been asked if they meet our 'isolation criteria.' It's always been deemed too intrusive to demand proof. We couldn't prove otherwise anyway. People could have told us anything they liked, (see material supplied by Jack McDonell in *Older Learners Online*.) Eleven years on, this remains the policy. There has never been any suggestion from course leaders that the system has been abused.

By the beginning of June 1999 we had 150 isolated people enrolled in our courses (see the chapter on Course Development.) It was a stunning response considering the comparatively small amount of publicity the project had received. Sandra had sent off material to leading newspapers though how much was used remained unknown. Even so, we had enrolments from remote towns, from the cities and rural areas. Two were from King Island in Bass Strait, exactly the type of place where we hoped we might find participants. We learned a valuable lesson when South Australia's Colin Lawton was able to get material published in Adelaide (see Sandra Duke's report in *Older Learners Online*.) I was able to get some air time on the ABC Radio in Canberra and get some other media exposure and as well, we were able to get some material into a few U3A newsletters.

One of our most effective PR exercises came later as the result of some stuff we managed to get into Centrelink's magazine. Going for the right market made all the difference.

It's worth mentioning here perhaps that it's always been difficult, even in later years, to recruit retired journalists or public relations personnel to the Committee of Management (CoM). At times some of its members would believe people without professional media or PR experience could easily do such work, but they came to appreciate that to attract good, effective media attention it does require specific skills, just as other kinds of work does...the old story: don't ask a plumber to be a brain surgeon. Having that specific journalistic and PR background myself, I suppose I was the 'natural' person to undertake such work but for a number of personal reasons I chose to concentrate on other aspects. I also, felt it needed a fresh pair of eyes. At the time of writing we are still trying to find someone prepared to take on this responsibility.

From the earliest times, Jack, Rick and I, along with Alastair and Sandra (and her successors) were holding regular discussions by phone and email with a teleconference at ALA set up for once a month, more often if necessary. We didn't do it too frequently because in those days, long before such things as Skype, they were too expensive. We did however, make recourse to hundreds of emails with either

Jack or Rick (I'm not sure which) noting that he had received 1600 plus such messages in the first few months alone.

With the first courses coming on stream, Rick undertook to look after their development while Jack took on the responsibility for development of the website and for communication with Chirp on design matters. We still needed someone to prepare the course material for the website though and turned to the University of Canberra for that help when we saw they were already putting some of their course work online for students.) When approached, the Vice Chancellor, Professor Don Aitkin, already a good friend of U3A ACT, was enthusiastic about the venture and made it possible for us to work with their Department of Adult Education, in particular Professor Barbara Chambers, her colleague, Assoc. Professor Barbara Pamphilon and Dr Noel Vanzetti. Among other work, Noel undertook to transfer the course material into HTML. Later, after his retirement, he too, would remain with us as a member of the team. It must speak a lot for the project and the camaraderie among the people involved that when they have ended professional work so many have elected to remain with us in some capacity.)

The university charged us commercial rates for this work (\$75 an hour) but undoubtedly helped us in many ways just as Duncan Crombie was doing at Chirp. The funding for this of course, came out of the government grants. UC continued to do this work until we moved the whole project to Griffith University in Brisbane in 2001/2. It proved most fortuitous that at about this time the Federal Government decreed that Universities should demonstrate some form of community involvement, for, to meet this requirement, GU offered to provide U3AOL with 'in kind' assistance to the value of \$5000.

Given our successful innovation, it was no great surprise that our colleagues in the UK were beginning to think of establishing something similar. Already we had some subscribers from overseas and of course, their two most prominent members, Jean Thompson and Tom Holloway, were involved with us. We felt it made sense to have some sort of joint venture rather than two separate entities and accordingly Jack McDonell and Rick Swindell set up discussions with our friends in England. In 2001/2 we began a joint venture with the Third Age Trust (the UK umbrella for all UK U3As) whereby we both made our courses available to our respective individual subscribers through our own organization.

While the name **Isolated Bytes** was appropriate at the beginning of the project, with the concept becoming a formality once we were really in business, we felt we needed something more appropriate and more easily recognisable. With due regard to simplicity, we decided on USA Online, U3AOL for short. To start with though, we retained the *IB* name for the courses but eventually that too, would be dissolved into U3AOL. It has been that way ever since.

A condition of getting a government grant is that you must write progress reports every three months and a final one at the end of 30 June<sup>^</sup>the end of Australia's financial year. By the time for the final report we were riding high. The demand for such a project was increasing daily and people were readily telling us we were 'making a difference' to their lives. Rick has kept a record of many such comments and should they be wanted, they can be located on the website. (See also the publication *Ginger's Story*.)

Our first grant was officially coming to an end and we had to address the matter of further funding to carry on. Our income from course fees was by no means sufficient to meet the expenses involved. Given that we had not had a full 12 months to complete a year's effort, we applied for, and were given, an extension of three months. This gave us time to prepare the paper work involved for requesting a second smaller grant - at first we thought a modest \$80 000 would be appropriate. How we'd learnt from those earlier days of guessing and coming up with something around \$12-13 000! We received some quiet advice: forget \$80 000. You won't get it. Try for \$60 000.

We knew the \$120 000 was an innovation grant and the chances of that being repeated were very slender but we hoped either an exception would be made or DETYA itself would help us.

Because the actual funds for our grant had come EdNA (Department of Education, Training and Youth Affairs (DETYA) we were told that no more money was allowed to come from that piggybank. It's constitution enabled it only to assist new projects and we were now considered an 'established' one. I recall that when the department asked me to be a guest speaker at a national conference they were holding in Canberra on adult education and technology, I raised the issue of how it was great to get such an innovative grant, but how necessary it proved to be to have a follow-up; that it took at least 12 months to find your way and become established. Cutting off the money in a case such as ours at the end of that time could mean that the first grant would be a dead waste of money if the organisation involved could not find funding to continue. That position was well received and applauded by other participants who shared our situation.

Give them their due though - the department appreciated the comments and said it would take them on board. However, if they did, we never heard from them! We were left to find money to keep the project afloat for 1999- 2000 and beyond.

### **Aged Care and Ministerial liaison**

Well, where was the next lot of money to come from? That early response of 150 subscribers gave us a great deal of confidence but we realised we were now on our own and had to look elsewhere.

We were fortunate. We had good contacts in the Department of Health and Ageing (sometimes called Ageing and at other times Aged Care, depending on the current Minister) and better still, we had links into the office of the Minister for Aged Care, then the Hon. Bronwyn Bishop.

By this time we'd not only set up our PRG, but as well, we had established an Advisory Group. This needs a note of explanation. The group was made up of small number of people outside U3A who, from its outset, had taken a special interest in what we were doing and could both help and advise us. Like ordinary U3As, U3AOL has always been apolitical but in our case, unlike with most U3As, we needed the help of the Australian Government so had no hesitation in including two 'friends,' Senators Jeannie Ferris and Kate Lundy. Alastair Crombie joined the group when he retired from ALA as its executive director, as did others who successively held that role. Gradually we added several others: two of the most active were Mary Hannan, ALA's business manager, and Carolyn Swindell *after* she left the staff of the Minister for Aged Care, Bronwyn Bishop.

Much later when we decided it was helpful to have another small group of people who had either helped us in a different way as retiring members of the CoM or volunteers whom we felt in future might prove useful as CoM members, we differentiated between the two by calling the original group the External Advisory Group with the second becoming just the Advisory Group. Then in about 2006, we felt the original group had served its purpose and decided to abandon it.

When we turned our attention to Aged Care, we were quite sure our Senate friends had a word with the Minister, Bronwyn Bishop, on our behalf. In the meantime too, while it was purely coincidental, it did us no harm to have Rick's daughter, Carolyn, as a senior adviser to the Minister. From the beginning it is important for those reading this to know that the relationship was made clear both to the Minister and her staff and to those to whom it mattered in the Department.

When dealing with politicians of this standing to seek their help with funding inevitably you make various visits to them - or their staff - and Rick and I both came to know and develop a good relationship with the Minister's Chief of Staff, Stan Piperiglou. Stan supported the project and was a tremendous help to us. I made a number of visits to Parliament House in those days and it was always good to know we had 'friends at court,' even if we were always careful never to take undue advantage of their situation. And they

made it very plain, at no time would they have helped us if they had not believed in what we were doing.

Similarly, once we became involved in that direction, I had to make various visits to the department, in particular to the Office for Older Australians located in Health and Aged Care. Sometimes Mary Hannan, then our business manager, or Phil Robson, would come with me and again we developed an excellent relationship with the section that dealt with such projects. Again, too, in those early days, it proved extremely useful to have our base in Canberra.

Allan remembers this time all too well and has provided the following note: <sup>v</sup>I do recall quite clearly that we received the original grant of \$120 000, delivered to and managed by ALA, followed by a second of \$60 000 (plus GST would you believe?) which we managed ourselves. (We had to remit the GST component to the Tax Office. Talk about a money-go-round!)

We acquitted this grant in January/February 2003.

Anyone doing deals for future grants needs to realise the implications of GST -you either get the money from your sponsor to pay it if the tax is payable, or you pay it yourself out of your grant.

He also recalls that the third grant (also for \$60,000) came with almost impossible conditions...for one thing we had to insure it, and follow the most stringent accounting procedures, It was ,most fortunate that we had developed a close working relationship with Griffith University which agreed to accept and administer the grant on our behalf. Rick was on their staff and it was thanks to his liaison with GU that we were able to build up a close working relationship with the University

(It may be worth mentioning here, though chronologically it is out of place, some years later (2005-06) the Government decided to establish a new national, across-government portfolio, website for seniors. The task of doing so was given to Health and Aged Care which set up an Advisory Council made up of professionals in that field, IT personnel, and three volunteers from projects involving seniors. I (Dorothy Braxton) was asked to be one of the Council members as a representative from U3AOL. I served on it for the two years it took to get the work completed. We felt it was good that, years later, we were still considered to be among the 'right' people to be involved and that as such we could repay the Minister and department a little for what they'd done for us. I was also invited to the launch of the high profile website which was attended by a number of politicians, including the then Minister, Julie Bishop, and her namesake, Bronwyn Bishop. Judging by the interest shown in U3AOL, we still had many friends in high places. It was, though, a lesson in learning that such a project with paid professionals doing the professional work cost into the millions and took two years to set up. It was a useful comparison for us to work by.)

From time to time, too, a number of us have made a point of talking to other 'pollies.' While they were not in a position to get us funding, and indeed we had reached a stage where our future for a time was no longer dependent on a big Government grant, we felt the more who knew about us, the better it would be. Politicians talk among themselves and building up a good reputation could only help us if and when the time came for more assistance. But moreover, we just wanted them to be familiar with *a* program their government had funded. The person least interested in us in that position was Kevin Andrews when he became Minister for Aged Care. Although he agreed to talk with me for about 20 minutes all up, I felt I lost him when it came to first explaining U3A itself, about which he knew very little. However, he did perk up a bit when I told about USA Online.

It's perhaps worth mentioning too, that Julie Bishop became Minister for Aged Care at a time when again, we were not seeking any money but we did have the opportunity to fill her in on the venture. Then in 2007 we asked her to launch our research book, *A Voice Worth Listening To*, at an event hosted by the Vice Chancellor of Griffith University.

We were always careful to keep Jeannie Ferris (who died in 2007), Kate Lundy, Kay

Patterson, Bronwyn Bishop and others in touch with our ongoing achievements, no matter what their responsibilities were, something they genuinely seemed to appreciate. Kay was to write, it was unusual for grantees to bother to let them know how projects were progressing. Di Delchau President in 2007-09, and Rick later did this too with Justine Elliot when she was appointed to that portfolio when Labor came into government.

### **The olde order changeth**

By the time we received our third grant we were given to understand in no uncertain terms by the Office for Older Australians that there'd be no more money forthcoming from the Department after that one. Nor in fact was it likely that we could expect any more help from any other government department. We were on shaky grounds. Unlike an ordinary U3A, U3AOL was - and is - an expensive venture, regardless of whether everyone involved gave their time freely or not.

We felt pretty despondent. Counting the time we had worked on the project before its actual launch, our hearts and souls and a great deal of energy had gone into the project over several years.

The facts were obvious: our income from subscriptions was nowhere big enough as yet to sustain our website, course development and management expenses. We had learnt the hard way just how expensive this sort of adult education project could be, something that was always difficult for members outside U3AOL to comprehend. At that time we were paying \$75 to the University of Canberra just for their input to every course, we still had to pay Chirp to be our server and we had to meet the cost of a part-time coordinator. That was without administration expenses. Just to have a teleconference cost a couple of hundred dollars.

Although we thought it was most likely to be successful, we had in fact, tested the water for an ACT Government grant. It had called for applications from organisations wanting money for seniors' projects. We knew we fitted the criteria as such so Rick and I, along with Dr Elizabeth MacKinlay, then chair of the ACT Advisory Group on Ageing and a good friend of U3AOL, had a friendly meeting with their representative but it was with fingers crossed. We knew the rules...spend the money in the state or territory involved. That was how it proved to be. People were very nice to us but a project that went over such borders? Oh dear, no. That's not how Australia works.

What to do next? Rick, Jack and I, plus Gwen, who lived not far from Canberra on the South Coast, had a face to face meeting at my place to discuss whether we could salvage the project or admit that we had proved such a venture was both feasible and worthwhile providing you had the money but, without further funding, was simply not sustainable.

We spent time discussing how we could carry on with Rick saying we closed down 'over my dead body.' I echoed his words but I don't know that inwardly I felt so confident.

### **The Structure of U3AOnline**

In the very beginning we referred to ourselves as "Isolated Bytes", and whilst this was a catchy name and indicated what we were about, it became clear that we needed a better name and so came up with U3AOnline. We received advice that to trade across state borders we needed to be a federal entity, and so became a company registered under the then Companies Act and became U3AOnline Resources Ltd. It was so named because firstly we were to be a virtual U3A (access via the internet) and a provider of resources for all U3As

in Australia and New Zealand.

This required us to be registered with the tax office for GST, and we had to remit a GST component from every subscription received via a quarterly BAS (Business Activity Statement).

Disaster loomed when, in early 2003, ASIC demanded we supply audited accounts for the financial years 2000/01 and 2001/02 complete with cash flow statements. We quickly learnt that these audits could only be carried out by ASIC registered accountants who were able to charge premium fees for their work. These two audits used up most of our meagre funds (\$3000) and left us in a perilous financial state.

The decision was taken that we should deregister as a company and become an incorporated association in line with all other U3As. This brought us under the care of the NSW Office of Fair Trading and required the formalities to be approved by special general meetings of members, (of which we had about 15/16 at the time). Roger Wiggill of Melbourne. In conjunction with Allan Thompson drafted the constitution in accord with the model constitution provided by the Department, but modified to accommodate our method of operation (and thus it became known as 'own rules') and this had to be approved by the membership.

We were required to assure ASIC that any monies held by U3A Online Ltd would be transferred to the new entity, the Tax office deregistered us in regard to GST and we eventually became an Incorporated Association with Allan as the Public Officer. As required under the Act, he had to be a NSW Resident. Allan was Secretary/Treasurer at the time.

The process of becoming incorporated was quite involved and the Department required a lot of convincing that we could operate solely 'on line' as their rules stipulated that decisions had to be made by the members in general meeting, but they eventually conceded we could hold our meetings on line, including the AGM. At first we tried to register as The University of the Third Age Online, but were told the word 'university' was unacceptable as we were not an accredited university, so we settled for U3AOnline Incorporated.

In the earliest days one of the most obvious people we wanted -and needed – to help us was George Williams, (Canberra) then membership secretary for U3A ACT. Just as we had not been game to ask his wife, Pat Williams, to take on the task of being our treasurer of \$120 000 on top of her role as treasurer for U3A ACT back in 1998, so we felt we couldn't ask more of George at the time. He knew more about computers than any of us but we just had to wait. When his role in Canberra came to an end, we pounced. Since 2001 he has had the responsibility of developing USAOL's membership data base and has developed the new website.

George Williams maintained a data base of subscribers to our courses and was able to provide useful statistics on which courses were being undertaken, by how many and when. The CoM had long realised that subscribers were only enrolling for one course and dropping out after that course was completed. George spent many hours trying to devise a workable method of membership that would ensure renewals and an ongoing income, at the same time maintaining the different treatment given to isolated people as distinct from other subscribers. The solution proved to be quite elusive, mainly because of the complexities of working it through a web site together with the different treatment for isolated people.

George was also closely involved in the development and maintenance of the web site.

## **The Need for Change**

Dianne Delchau U3A Online President writes:

In July 2008, as Administrator, I received an Email from David Cooke from NEC asking if U3A Online could contact him to assess interest in joining with NEC and providing the service element in a submission to the Federal Government to bid for the Broadband for Seniors project. I phoned him and it eventuated that I handed the negotiations to Rick as it was clear that we could not alone provide the resources necessary for this project.

The initial discussion about this project brought forth some very negative comments from some CoM members but eventually a motion was passed, late in July, to continue with negotiations with NEC.

Rick took this task on with enthusiasm and got ALA and the Association of Seniors Computing Clubs Australia involved. There have been additional agreements signed and the project continues to receive funding from the government with U3A Online receiving a pro rata payment for each new agreement.

## **Changing the membership base.**

Because we needed to make it easier for people to become members and, as part of our BFS commitment, to give them access to all the courses it was necessary to create an entirely different membership system from that previously being discussed.

Changing to a system that allowed people to become a member for a small fee and then to have access to all the courses brought us more in line with the membership process of other U3As and also meant that we could meet our obligations to the BFS project.

On 30<sup>th</sup> June 2009 the first stage of the change to membership was completed by EIS Consulting Services (Colin Morris's group working out of Griffith) and became available on our site. There was a second stage (to fix anything missed in the first emergency membership fix) that came into operation, I think, about end of July but that was just fixes and not any noticeable changes.

Once we received the BFS money for the first 2 years of the project we had the finances to allow us to look seriously at developing a completely new Web Site that would no longer be tied to the Griffith site.

Rick and I attended many meetings at Griffith to determine if they were able to help us with this and eventually they told us that Griffith was planning on moving away from the Blackboard system of course presentation to that of Moodle. This meant that we could have our site developed around the Moodle system and then Griffith would be in a position to continue to provide the maintenance for our site as they had in the past.

Based on this information Rick and I pushed for the new site to be developed and so EIS Consulting Services began looking into this project. Eventually, without actually informing us that Griffith had changed its mind about moving to Moodle, they recommended that we develop our site around the Moodle system in conjunction with aMember software for the administration. The CoM accepted this recommendation at the F2F Com meeting in February 2011. We were then informed that they would call for tenders to do the development work (we still did not know that Griffith were no longer considering using Moodle). They received quotes from two sources and recommended one of the businesses.

By C/R on the 12<sup>th</sup> May 2011 the CoM accepted the recommendation and IBS was given the task of developing the new U3A Online website.

The new website went live on the 6<sup>th</sup> December 2011, also, on the 5<sup>th</sup> of December, a C/R motion to proceed with the further development of the Member Lounge was passed by the CoM.

Because Griffith, unbeknownst to us, were not in a position to continue to provide maintenance for the new site and IBS had not known that was a possibility and so had moved to other services we have now been without proper maintenance for nearly 12 months. Griffith continues to host the website. We have now employed Catalyst to take on the project of doing enhancements to the site and to then develop a maintenance contract with U3A Online for ongoing maintenance.

## **Course Development**

Once again returning to our early days, Dr. Les Day (Melbourne) was instrumental in the securing and development of courses for U3AOL. He established the CAT (Course Advisory Team) and maintained his role until 2007/08 when he resigned to better care for his wife who was very ill. We were extremely fortunate that earlier, in 2007, Kathy Rossini had joined our ranks.

Kathy sent an Email via the enquiries Email address listing her skills and offering to do work as a volunteer with U3A Online – she was recently retired. This was early in January 2007 and on the 18<sup>th</sup> February she was appointed as an Advisor. She begun to work with Les Dale as part of the course advisory team by using her HTML skills to develop the courses that the Course Writers sent in.

She joined as a member on the 2nd march 2007 and on the 23<sup>rd</sup> March was appointed to a Casual Vacancy on the Committee. On the 16<sup>th</sup> May a motion was passed to make her the CAT Coordinator.

She had a brief break from being on the committee from the 2010 AGM until being re-elected at the 2011 AGM but she resigned from the Committee and all roles with U3A Online on the 4<sup>th</sup> December 2011.

When she began, U3A Online had about 12 courses and when she left there were 43 courses online.

Bev Tapper had already taken over as the Course Co-ordinator and David Mitchell is doing work on the Course Development of courses submitted by the Writers. When the new web enhancements are online new courses will once again be available.



