

U3As in Australia and New Zealand 2008: The Successful Ageing organisations

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A U3A Online at Griffith University Successful Ageing Study 2008

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I Executive Summary

The population is ageing, society is changing rapidly, and individuals are experiencing ever more complicated lives. For functional reasons older people need to continue to learn new things in order to cope with technological and social changes that affect their daily lives. In addition, research over the past few years has underscored the importance of older people continuing to learn new things for the positive effects that learning can have on the brain.

U3As provide myriad teaching/learning opportunities for members. In addition they are very good at providing other components of the successful ageing model, which is explained in the introduction to this report. For example, U3A members can choose to take part in physical activities and a range of interesting social activities. Everything within the typical self-help U3A is carried out by retired volunteers who benefit from volunteering their expertise for meaningful tasks that utilise skills acquired from their earlier paid working life. The entire operation engages members in novel learning activities carried out in a stimulating social milieu with like-minded others.

This study, the largest undertaken of U3As in both countries, was devised and carried out by a team of U3A researchers and leaders and funded by U3A Online.

Response rates were good with 127 (62%) Australian U3As and 38 (63%) NZ U3As responding. Collectively these responding U3As represent more than 82% of the Australian U3A membership and 71% of the NZ U3A membership.

Key findings

- A detailed audit of all volunteer activities was carried out for each U3A. This showed that, in Australia in 2008, volunteer tutors (course leaders) collectively contributed more than 667,000 hours towards their U3A courses and activities. Administrators and other volunteers contributed 192,000 hours. These data were used to arrive at a total hourly volunteer figure extrapolated to all 205 Australian U3As. A notional dollar value of \$20 an hour was ascribed to the activities to give a conservative value for Australian U3A voluntarism in 2008 of more than \$21 million.

In NZ U3As volunteer tutors in 2008 provided more than 54,000 hours and administrators and other volunteers provided more than 14,000 hours. These figures were used to extrapolate to all 60 NZ U3As to give a conservative value for NZ U3A voluntarism in 2008 of more than \$1.9 million.

- The 205 U3A groups in Australia range in size from a low of 24 members to a high of 5500 members (Sydney U3A). The largest free standing U3A is U3A ACT with 3700 members. Nine groups have 1000 or more members. The median U3A Australian membership number is 414. Australian U3As do not appear to limit membership numbers.

The 60 NZ U3A groups range in size from a low of 30 members to a high of 824 members (Wellington City). The median membership is

201. Many NZ U3As limit membership size to around 200 in order to maximise opportunities for social networking. Most of these capped U3As have membership waiting lists.

- In both countries the number of males participating has increased substantially from earlier findings. The female/male ratio is now 3:1.
- Few U3As record members' age ranges. This information would be helpful to assist U3A leaders to understand how their organisation is faring over time. U3A ACT reported attracting a healthy flow of recent retirees as well as retaining a relatively high proportion of old members. One quarter of its 3700 members were aged 65 or less; 14% were aged 80 and older.
- Many U3As continue to receive generous in-kind assistance from local community organisations but there are reports of this becoming scarcer due to community changes such as Council amalgamations and society moving more strongly towards a user-pay approach. Finding suitable low cost accommodation remains the most pressing problem facing U3As. 78% of Australian U3As favour regular government or agency support to help address their accommodation difficulties. This idea is much less popular among NZ U3As with considerably fewer than half (43%) in favour of government or agency assistance. Regardless of whether or not they support the idea of government assistance U3As in both countries are adamant that they must remain as self-help, autonomous organisations.
- Providing intellectually stimulating opportunities and social networking are seen as the two major accomplishments of U3As in both countries. U3As in both countries strongly support the continuation of a laissez faire approach to teaching and learning in which course leaders come from any walk in life and teach in their preferred style. Any course that broadly fits with the U3A philosophy is acceptable, although 16% of NZ U3As would prefer the courses to be academic in nature. The three most sought after course areas in Australian U3As are computing, history and languages. In NZ the three most sought after course areas are history, music and art appreciation. Exercise courses rate highly in Australian U3As but not in NZ U3As. Teaching takes place in any suitable community venue like rented premises, free or subsidised community facilities or private homes. Teaching in members' homes is much more prevalent in NZ U3As than it is in Australian U3As.
- More than a third of U3As in both countries do not use the Internet as a teaching/learning resource.
- The success or failure of a U3A group is strongly related to the skills and energy of its leadership. The overwhelming majority of U3A office bearers in both countries come from highly skilled/credentialed backgrounds.

II Background to the study

Faced with a burgeoning ageing population, governments in many countries are seeking creative ways for maximizing returns from relatively declining budgets and stretched social support services for the elderly. Inevitably the emphasis has swung from expensive, later life medical heroics to an approach that places increasing onus on ageing individuals to take more responsibility for their own ageing. Preventative rather than remedial interventions have become the major goal for addressing myriad social and economic challenges that accompany population ageing.

Old machines wear out. However, with regular maintenance and timely expert mechanical intervention, old machines can continue reliably carrying out their designated functions for years. Something similar applies to older human machines. It seems that if people choose to adopt a few sensible lifestyle habits then they stand the best chance of maximizing their own longevity and independence. The key word in this is “choose”. By choosing to follow a regular self-maintenance program throughout its life, the ageing human machine is likely to carry on successfully to a ripe old age with far less reliance on expensive medical intervention needed to get it back on the road.

Successful Ageing

During the past two decades many studies have been carried out in an attempt to determine why some people in their 80s, 90s and older continue to engage optimistically and independently with everyday life, whereas others who are younger have already lost their independence. Successful ageing, ageing well, productive ageing, active ageing, healthy ageing, and positive ageing are among a number of closely related, evidence-based models that differ from each other in emphasis rather than absolute content (Friedrich, 2003). Regardless of which model is emphasized, each is about a quite small number of choices that older people should follow if they are to maintain a sense of control over their environment while balancing the gains and losses in later life.

The MacArthur Foundation Study of successful ageing (Rowe & Kahn, 1999) illustrates the substantial gains in understanding of ageing that can flow from a large, interdisciplinary research approach. The study, which was actually a coherent set of dozens of individual research projects led by 16 researchers from across the broad spectrum of gerontology, was the most extensive and comprehensive multidisciplinary study on ageing in America. The Successful ageing model which was an outcome of the collective findings, outlines three fundamental attributes of a successfully ageing individual, namely:

- i) low risk of disease and disease-related disability;
- ii) high mental and physical function;
- iii) active engagement with life.

Each of the three components of the model is important in itself. However they may be somewhat hierarchical in that the absence of disease and disability may make it easier to maintain mental and physical function, and this in turn

may enable, but not guarantee, engagement with life. The three attributes will be briefly discussed in the following paragraphs.

i) Low risk of disease and disease-related disability

Many people consider that the risk of disease is entirely down to the lottery of genetics; did we choose our parents wisely? The role of genetics in successful ageing is important but the influence has been considerably overstated. Family studies, population studies, adoption studies, and studies of twins, which were all components of the MacArthur Study, allowed the interplay between nature and nurture to be separated. For all but the most strongly determined genetic diseases, environment and lifestyle have a powerful impact on the likelihood of actually developing the disorder (Rowe and Kahn, 1999). Thus, decisions to cut out smoking, eat less fat and red meat, eat lots of fruit, vegetables and fish, reduce alcohol intake, lose weight, avoid over exposure to sunlight, and exercise regularly, are some of today's well-publicised environmental and lifestyle choices that directly lower the risk of disease and disability.

However, even after health problems occur, older people can successfully continue to engage with life if they adopt health control strategies like seeking help, devoting time and energy to addressing the challenges, and being committed to overcoming threats to physical health. For example, in a recent two-year follow-up study, Wrosch and Schulz (2008) found that elderly participants who were proactive and persistent in countering health problems showed greater physical and mental health benefits than those who were not. Their findings suggest that once disease strikes, active control strategies play an important role in the maintenance of older adults' physical health.

ii) High mental and physical function

Considerable evidence exists which demonstrates a link between cognitive stimulation and aspects of health and well being. Perhaps the most compelling recent summation came from *The Foresight Project on Mental Capital and Wellbeing* (Beddington et al, 2008) which took a whole-of-life approach in reaching its conclusion that countries must learn how to capitalize on their citizen's cognitive resources if they are to prosper. More than 450 experts and stakeholders from 16 countries were involved in the review of state-of-the-art scientific and other evidence to investigate the challenges and opportunities that lie ahead in the next 20 years. The recommendations regarding older learners are particularly noteworthy. The study recommended that *"as people move into older age, learning should be encouraged and actively promoted, as this can protect against cognitive decline"* (p. 1058).

The benefits of exercise have been known for many years. Numerous studies continue to show that exercise reduces the risk of cardiovascular disease and overall mortality risk, as well as promoting psychological well-being. However, physical activity also improves brain function (Lautenschlager et al. 2008). Exactly why exercise has a positive effect on brain function is not yet known. One suggestion is that exercise helps to maintain the health of blood vessels in the brain, helping to ensure a steady supply of oxygen and nutrients to areas of the brain that are critical for thinking and memory. Physical activity may also help stimulate the release of factors critical for brain cell growth,

increasing resistance to damage caused by dementia. Andel and colleagues (2008) studied exercise patterns in 50 year olds and followed up 30 years later. They found that exercise at midlife reduces the odds of dementia in older adulthood and concluded that exercise interventions should be explored as a potential strategy for delaying disease onset.

iii) Active engagement with life

In the Successful ageing model there are two separate elements to actively engaging with life, namely: maintaining close social networks and doing interesting things.

The literature on social networks is extensive, and numerous research findings are linked with health outcomes (Bowling 1994). In fact, findings about the fundamental importance of social networks have been sufficiently robust that more than twenty years ago a review of social network research prompted House, Landis and Umberson (1988) to conclude that a lack of social relationships constituted a major health risk akin to the early years of smoking. More recent findings continue to refine the specific benefits of social networks. For example, Ertel, Glymour and Berkman's (2008) nationally representative study provided evidence that social integration delays memory loss among elderly Americans.

The other element of actively engaging with life is doing interesting things. The domain of "interesting things" is subjective and open ended – in other words, what is interesting for one older person may hold no attraction at all for another. Consequently, attributing a specific health and well-being outcome to a particular "engaging" activity requires targeted research. Volunteering is an interesting activity for many older people and volunteering continues to be widely studied. It seems that everyone can be a winner from voluntarism: participants, recipients of the services, and the wider economy alike. For the volunteers themselves, those who regularly engage in their voluntary activities enjoy better health and live longer thanks to the stimulating environments and sense of purpose engendered by the activities. Zedlewski and Butrica (2007) summarised the outcomes of 10 studies published since 1999 which documented the significant positive associations between volunteer activity and decreased mortality and depression, improved health and strength, greater happiness, and enhanced cognitive ability. Volunteers are doing themselves a considerable service while helping the wider community.

U3As as successful ageing organisations

The five elements which make up the three components of the successful ageing model, namely:

- keep the mind active
- keep the body active
- maintain close social networks
- do interesting things
- take the necessary steps to avoid disease or minimize the consequences if disease occurs

provide an easy-to-remember, evidence-based checklist by which older people can readily monitor their lifestyle choices.

All leisure organizations for older people provide their members with opportunities to engage with one or more of the successful ageing elements discussed above. However, U3As appear to be particularly well suited in this regard. The principal *raison-d'être* for U3A is the provision of intellectually stimulating activities in a social environment. However, later in this report we discuss the laissez faire approach to the U3A teaching-learning environment where it is shown that the large majority of U3As interpret teaching and learning in a very broad way. Provided courses are deemed appropriate by management committees - and provided volunteers are available to teach and members are interested in attending - then almost any category of course and activity falls within the U3A sphere of interest. Because of this very broad sphere of interest, members of reasonably large U3As can choose whether to focus on intellectually challenging courses, exercise related courses, activities with a major emphasis on socializing, or a mixture of everything. It seems reasonable to describe organisations that provide a broad range of opportunities for members to engage with the elements of successful ageing, as successful ageing organizations. Many self-help U3As appear to satisfy these criteria.

This study reveals some of the characteristics of Australian and New Zealand U3As as successful ageing organizations in 2008.

III Methodology

The idea of an Australia/NZ research study was first discussed by U3A Online in late 2007. U3A Online has carried out a number of research projects previously and management believed that the climate of good will and cooperation between U3As in both countries was then sufficiently robust that a joint study with other U3As was practicable. U3A Online agreed to fund a study to reveal the characteristics of U3As in both countries, provided that it was carried out by a collective of U3A leaders, retired U3A researchers and U3A leaders from both countries, and provided that it had the support of all or most major U3A networks and regional clusters.

In 2008, leaders of U3A networks in Australia and major U3A regional clusters in NZ were asked to nominate a retired researcher or person knowledgeable of the U3A movement to become members of a research Project Management Group (PMG). The task of the PMG was to develop and manage all stages of the study including: defining the nature and extent of the study; developing the questionnaire; carrying out the analysis; contributing to the report; and advising on report distribution.

All networks and regional clusters endorsed the idea of a joint U3A research project and each nominated a person for the PMG.

The PMG membership and affiliation is listed in Table 1.

TABLE 1: Project Management Group¹

Rick Swindell	U3A Online: Project leader
Ken Vassella	U3A Online: Data analyst and project manager
Lee Morgan	Christchurch U3As: NZ U3A data coordinator
Tony Sayer	U3A ACT: Australian U3A data coordinator
Ron Browne	U3A Network - NSW
John Stewart	Auckland U3A Network
Jill Waddington	President – U3A Wellington City
Betty White	President – U3A South Australian Alliance

Communication and document exchange was enabled through a wiki² which allowed members of the PMG to contribute ideas, submit and edit documents and keep track of discussions.

¹ The nominee of the U3A Network – Victoria was forced to withdraw from the PMG early in the study. U3A ACT is not a network; however the U3A ACT representative was specifically invited to join the PMG to contribute specialised skills.

² A wiki is like a communal website that allows members to set up their own pages, keep track of discussions by others, share and edit other documents etc. Unlike a website, a wiki requires little in the way of technical expertise from participants and it is free.

The PMG agreed that the study should:

- describe characteristics of the U3A movement in Australia and NZ in 2008;
- provide baseline data against which future developments in both countries can be compared; and
- quantify the nature and extent of U3A voluntarism.

For practical and cost reasons it was agreed that the survey should be distributed only to Committees of Management. The PMG noted that it would be desirable in the future to undertake a random survey of members with a view to identifying some member characteristics and aspirations.

Questionnaires were mailed to all U3As listed in the U3A Online database *Locate a U3A*; 205 in Australia and 60 in NZ. Two reminder emails were sent before the closing date for returns. Response rates are discussed in the following section.

Each participating U3A was asked to nominate a U3A Liaison Person to be the primary contact person between individual U3As and the PMG. In addition the Liaison Person would take responsibility for coordinating the research at the local U3A level and ensure that it was returned before the deadline.

Data Analysis

The data were recorded into SPSS Data Editor and analysis queries were performed using this program. The results of the queries were transferred into Microsoft Excel where multiple choice and open ended answers were consolidated into manageable subsets. Other statistical calculations and creation of graphs and tables were also performed in Excel.

IV Results

Response rates

Questionnaires were mailed to all U3As listed in the U3A Online database *Locate a U3A*; 205 in Australia and 60 in NZ. Two reminder emails were sent before the closing date for returns.

Participating U3As and membership numbers are listed on the following two pages.

Table 2 summarises the response rates and membership numbers by country

TABLE 2: Response rates by country

		Australia	NZ
1	Number of U3As surveyed	205	60
2	Total U3A membership 2008	64,160	10,154
3	Number of U3As responding	127 (62%)	37 (63%)
4	Membership of responding U3As	52,458 (82%)	7,426 (73%)

Sixty-two percent of Australian U3As and 63% of NZ U3As responded to the survey. Importantly, the large majority of U3A members were represented in the survey returns indicating that the largest U3As had responded. Eighty-two per cent of the total Australian U3A membership was represented in the Australian U3A returns; 73% of the total NZ U3A membership was represented in the NZ U3A returns.

Data in Table 3 are used later in this report for the calculation of total dollar value of U3A voluntarism by country.

U3A Profile

Part A of the questionnaire was designed to provide basic data about U3A operations in Australia and NZ and to canvass ideas which U3A management may want to consider as the organisation continues to grow in a rapidly changing world.

U3A Growth

Charts 1A and 1B show the number of U3As starting each year. Start-up dates were obtained from the U3A Online database of Australian and NZ U3As, *Locate a U3A*. This is the only regularly updated source for total U3A membership in either country. The accuracy of information about U3A growth and yearly membership outlined later in this report is dependent on the accuracy of regular updates of information provided by all U3A.

TABLE 3: Groups participating in the study

(Numbers in brackets show the number of participating U3As and the total number in the region; and the number of members within the participating U3As. In NSW for example, 37 of 56 U3As participated; the membership of these 37 U3As was 16123)

Australian Capital Territory (1/1)

ACT	3650
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Northern Territory (1/3)

Alice Springs	115
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New South Wales (37/56; 16123 members)

Armidale	649
Ballina/Byron	350
Batemans Bay	390
Bathurst	301
Brunswick Valley	170
Central Coast (NSW)	77
Cessnock City	52
Coffs Harbour	298
Corowa/Rutherglen	102
Cowra	25
Dubbo Chapter	348
Eastlakes	463
Forster Tuncurry	201
Grafton	320
Griffith	89
Hawkesbury	305
Hunter	480
Inverell	128
Kiama	215

Lake Macquarie	684
MacArthur	175
Manning Valley	298
Milton-Ulladulla	362
Moree	49
Mudgee District	238
Nambucca Valley	258
Namoi	45
Nepean Blue Mountains	1008
Northern Illawarra	150
Northern Rivers Lismore	602
Orange	189
Port Stephens	134
Shoalhaven	333
Southern Highlands	699
Sydney	5480
Warrumbungle	41
Wollongong	415

Queensland (15/31; 10350 members)

Bribie Island	660
Brisbane	2559
Bundaberg	1350
Capricorn Coast	91
Dalby	233
Granite Belt	118
Jimboomba & Regions	93
Maryborough	258

Noosa Regional	572
Pine Rivers	500
Redlands District	1215
Sunshine Coast	1670
Townsville	523
Tweed Coast	343
Warwick	165

South Australia (12/17; 2538 members)

Adelaide Hills	261
Aldinga	190
Flinders	207
Lower North	220
Mt Gambier	176
Murraylands	155

Port Adelaide	62
South Coast	301
Strathalbyn	120
Tea Tree Gully	642
Whyalla	76
Yorke Peninsula	128

Tasmania (5/9; 1333 members)

Clarence	288
Glenorchy	65
Hobart	616

Kingsborough	321
Tasman	43

Victoria (50/79; 17031 members)

Albury Wodonga	207
Antonia	69
Bairnsdale	317
Baw Baw	97
Bendigo	265
Castlemaine	300
City of Melbourne	815
Cranbourne	142
Croydon	705
Dandenong	532
Echuca	24
Emerald	102
Gannawarra	117
Goulburn Valley	213
Hastings	107
Hawthorne	1227
Hepburn Shire	132
Highvale	123
Hobson's Bay	106
Hume	335
Kilmore & District	185
Kingston	488
Knox Inc	1108
Kooyong	78
Latrobe Valley	238

Macedon Ranges	61
Mallacoota & District	64
Manningham	1360
Mansfield	40
Maryborough District	45
Moonee Valley Region	356
Moorleigh	892
Mornington	616
Mount Waverley	500
Nunawading	1100
Pakenham & District	250
Phillip Island	160
Port Phillip	184
Ringwood Third Age	232
Sale	125
Seymour & Districts	141
Southern Peninsula	832
Sunbury	87
Sunraysia	424
Werribee Region	230
Whittlesea	317
Yarra City	218
Yarra Ranges	356
Yarra Valley	353
Yea	56

Western Australia (6/9; 1318 members)

Armadale	52
Bunbury	60
Geraldton	35

Mandurah	170
Manjimup	34
Perth Metro	967

New Zealand (37/60; 7426 members)

Bay of Islands	121
Birkenhead	100
Browns Bay, Auckland	204
Christchurch (Arts Centre)	130
Christchurch (Port Hills)	146
Christchurch (Rolleston)	132
Christchurch (Rutherford)	200
Dunedin	500
Eastern Suburbs Wellington	144
Epsom	140
Godley	204
Hastings	145
Havelock North	330
Hawera	98
Hutt	149
Kapiti Coast	525
Kate Sheppard	149
Mana	184
Manawatu	117
Manurewa	30

Motueka	
Mountfort	150
New Plymouth	151
Papatoetoe	68
Parnell	90
Ponsonby	65
Rotorua	150
Southland	120
St Heliers	156
Takapuna	320
Taupo	210
Tauranga	625
Waikato	85
Wairarapa	92
Warkworth	141
Wellington City I	824
Whanganui	180
Whangarei	251

CHART 1A: Number of Australian U3As starting each year

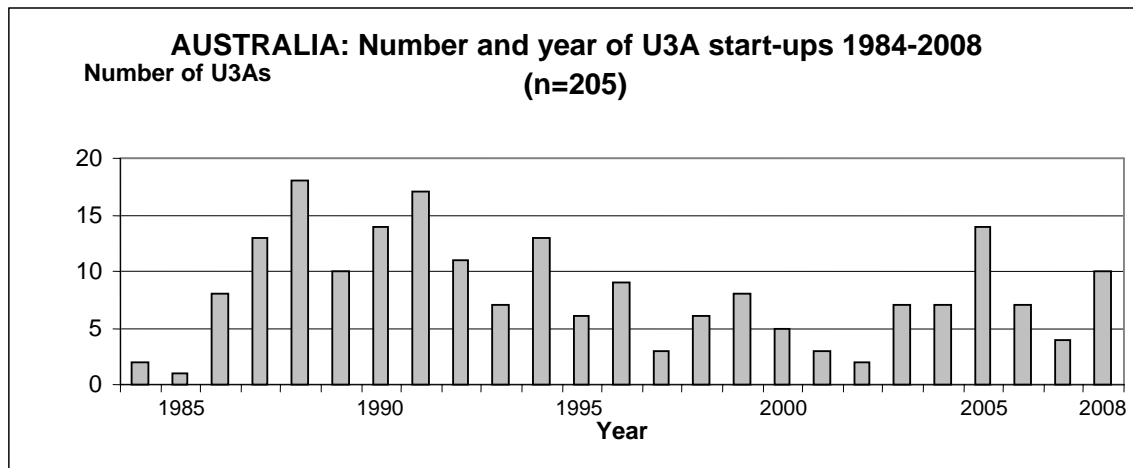
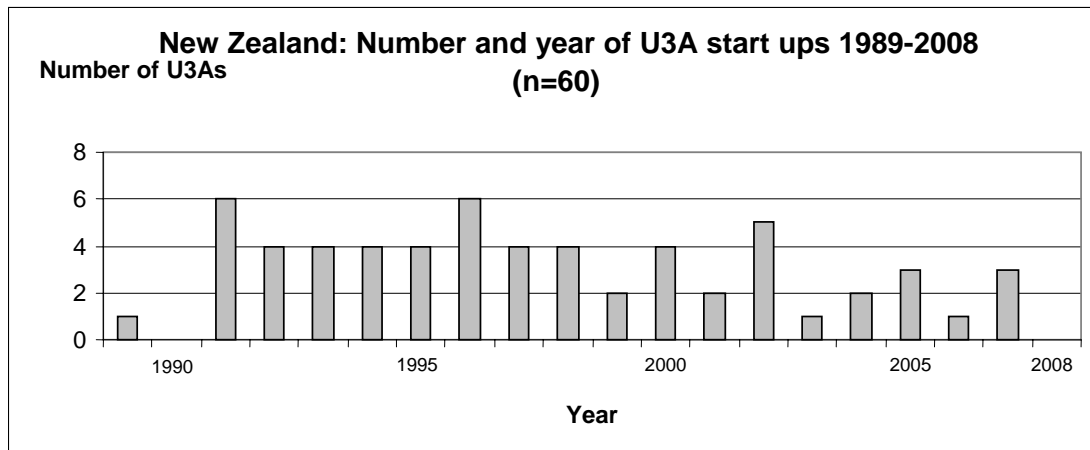


Chart 1A shows two periods of growth surge in new Australian U3As. The first two Australian U3As started in Melbourne in 1984. Rapid and sustained growth took place from 1986 until 1996, particularly in Victoria, and later in NSW, as strong networks in both those States helped to spread the U3A idea, not only within their own States but more widely as well. A free U3A start-up kit provided by the U3A Network-Victoria was very helpful in early years to assist would-be developers to understand both the process and ethos of new U3A development.

A second growth surge appears to have started in about 2003. It will be interesting to see whether this second surge can be maintained as the climate for cooperation and communication between U3As in Australia continues to improve and new networks, which are capable of taking responsibility for U3A growth at the wider level, come into being.

In 1998 U3A Online was started with one of its primary objectives being to foster cooperation and sharing of resources between U3As in both countries. The climate for cooperation and communication between U3As has improved steadily since then. A substantial breakthrough in inter-U3A cooperation occurred at the 2007 ACT Celebration conference. There, leaders from the U3A Network-NSW, the U3A Network-Victoria, U3A Online and many individual U3As met and committed to the ideal of cooperation and communication between U3As. In 2008, the U3A Network-NSW followed up on this good will by formally opening discussions with major Australian U3A bodies, aimed ultimately at forming a national U3A body. Progress since then towards some form of Australian U3A communications network has been encouraging. Also in 2008, *U3A Sunshine Coast* opened discussions aimed at establishing a state network with the 30 Queensland U3As and in July 2009, the U3A Network-Queensland was established. One of the major advantages of forming “peak” U3A bodies such as state and national networks is that they are able to focus on organizational growth, particularly in many rural and regional areas where the U3A idea is yet to emerge. Their efforts may well sustain the second growth surge discussed above.

CHART 1B: Number of New Zealand U3As starting each year



The first U3A, Remuera U3A, started in Auckland in 1989. From 1991, quite rapid growth in new NZ U3As occurred until 2002, particularly in the North Island. Since then, growth has shown signs of slowing, with no new U3As formed in 2008.

Forty-five of the 60 NZ U3As are located in the North Island. The greatest concentration of groups is in the Auckland region. In 1992 the *U3A Auckland Network* was formed, a move which helped to champion rapid growth in and around the Auckland region. There are currently 21 Auckland groups, the most recent of which was formed in 2002. A U3A Network committee is responsible for starting new U3As, generally within the region.³

Four U3A groups began in the Wellington regional area in 1991. A regional U3A communications network exists to facilitate communications and cooperation between the seven groups currently operating in the region. The most recent of the seven groups was formed in 1996.

Ten of the 15 South Island groups are in the Christchurch region. Six of these started in 2002 or later suggesting that good publicity or regional U3A cooperation is helping to spur growth there. The *U3A Network Canterbury* was formed in 2008 and is supported by most of the Christchurch groups.

Three international U3A conferences have been run in NZ, the first hosted by Auckland U3As in 1999, the second by U3A Tauranga in 2002, and the third by Christchurch U3As in 2007. Despite these notable examples of U3A leadership, communications between many NZ U3As appear to remain sporadic. There is considerable potential for U3A growth throughout NZ, but the drive for this growth may have to come from the networks taking the initiative to work together.

³ An in-depth overview of U3A in Auckland, prefaced by a succinct history of the introduction of U3As in NZ and interspersed with other timely comment on U3As in NZ, was published in 2003 by David Cole. It is available from the Auckland Network Trust. [See the references section.]

Membership growth

Recent membership growth is shown in Table 4.

TABLE 4: Australia and NZ U3A membership 2003-2009

		2003	2004	2005	2006	2007	2008	2009
Australia	Groups	164	170	175	195	200	205	211
	Members	51313	53456	54233	54759	62672	64160	64535

NZ	Groups	47	50	48	51	53	60	60
	Members	6438	7157	7246	7878	8702	9624	10154

Annual membership numbers for both countries are reported in February or March in the free monthly U3A Online email newsletter called *Signposts*.⁴ Most but not all U3As subscribe to the newsletter but the composite data shown in Table 4 for 2003-2009 have not previously been circulated. These composite data were obtained by backtracking through the Signposts archive available through U3A Online. *Locate a U3A* was the primary data source for Charts 1A and 1B and Table 4. However apparent inconsistencies appear if these are compared. There are several reasons for this, namely:

- Start up years shown in Charts 1A and 1B are fixed. However, reported membership numbers are constantly changing as the 271 individual U3As report changes to *Locate a U3A*, usually after their AGMs. There is no “best time” for a U3A census;
- The Signpost data reported in Table 4 are compiled and reported in February or March, and reflect 12 months of information, comprising 9-10 months of the preceding year and 2-3 months of the current year. As an example, the information reported for 2009 in Table 4 is mainly for 2008 with 3 months of 2009 added.
- Some U3A networks have recently updated the *Locate a U3A* data from their own records, to ensure that more U3As in their region are counted in the annual census. An example of this can be seen in the 2006 data for Australia in Table 4, which shows a sharp jump of 20 U3As. However, Chart 1A shows only 14 new U3As starting in that period. The six U3As which appear to have been “lost” started before 2005 and have been counted in their earlier start-up years in Chart 1A.
- Occasionally U3As cease operations and their records are removed from *Locate a U3A*. That will lower the count for previously reported census data.

⁴ Signposts is a cooperative venture between WorldU3A and U3A Online and is freely available to individuals and groups from any country. Individuals or groups can contact enquiries@u3aonline.org.au to be placed on the monthly email list.

- As of 2009, 23 of the 211 Australian U3As listed in *Locate a U3A* provide no membership numbers and two provide no start-up year. All NZ U3As report both statistics.

Until all U3As ensure they report annual membership and contact details in *Locate a U3A*, perhaps as part of standardized procedures following their AGM and possible change of leadership, it will be impossible to know exactly how many members belong to how many U3As in each country. Despite these limitations *Locate a U3A* remains the only practicable way of compiling up-to-date information about U3A membership and contact details.

Table 5 provides U3As with a 2009 snapshot of U3A membership by major region. This table has been included in this report to allow comparisons to be made when future U3A studies are undertaken. A similar breakdown for previous years by country is available from the Signposts archive accessible at www.u3aonline.org.au.

TABLE 5: 2009 Australia and NZ U3A membership by major region

Country/State	Number of U3As reporting	Membership	Number of U3As known but not listing membership
Australia	211	64,535	23
ACT	1	3600	0
NSW	56	17,846	5
NT	3	274	1
QLD	31	14765	4
SA	18	2517	6
TAS	10	2036	1
VIC	83	22044	5
WA	9	1453	1
NZ	60	10,154	0
North Island	45	7733	0
South Island	15	2421	0

Despite the improved communications between U3As, a notable feature in Table 5 is the Australian total of 211 U3As which includes 23 U3As (11%) giving no membership numbers.

Membership numbers	<i>What was your highest membership in 2008?</i>
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Membership ranged from less than 25 to more than 5000. In Table 6 the membership has been clustered into groups to allow some generalities to be made about current and preferred numbers.

TABLE 6: Membership numbers

	Median⁵	Range	200 or less	200-499	500-999	Over 1000
Australia	414	24-5480	27 (21%)	70 (56%)	18 (14%)	11 (9%)
NZ (n=37)	201	30-824	27 (73%)	6 (16%)	4 (11%)	0 (0%)

Membership

Many Australian groups are small; in fact, 27 of the 126 responding groups (21%) have fewer than 200 members. Most of these groups are in small population centres that would not experience the growth pressures faced by single groups in large population areas like cities or regions with many retirees. A number of participants believe that smaller groups are friendlier than larger groups. This is likely to be the case, but large or very large groups also operate very successfully in Australia. In general, administrators of large groups are strongly supportive of larger groups because of the greater variety of courses and services that can be offered to members. The single largest free standing U3A with more than 3700 members is in the ACT. Sydney U3A is the single largest U3A entity with more than 5400 members operating in 7 regions throughout the city. In Sydney U3A a central Management Committee, which includes the presidents of each of the regions, handles finances, newsletter production, theme lectures, travel and other "umbrella" activities. The regions themselves operate semi-autonomously.

Most (73%) of the responding NZ groups have 200 or fewer members. A widely expressed view is that large groups could lose the all-important aspect of friendship which is seen as a distinguishing characteristic of smaller groups. In the largest city Auckland, a general policy exists to maintain a membership ceiling of about 200. As membership size approaches the limit another group is started to serve a convenient geographical cluster. Nineteen of the 21 group members of the U3A Auckland Network have 200 or fewer members. In the Christchurch region, the 10 groups listed in *Locate a U3A* also have 200 or fewer members and nine of these have small to large waiting groups. U3A Wellington City has 824 members and is the largest U3A in NZ. Two other U3As in the Wellington region have more than 400 members. Tauranga U3A

⁵ The term median refers to the middle number when all responses are sorted from lowest to highest. It is a more informative number than the mean (average), which can be distorted by a small number of very low or very high numbers. For example, Table 6 reports that the 63rd largest U3A in Australia (i.e. the middle in the sorted order of 126 U3As) had 414 members. The range reports the smallest U3A having 24 members and the largest 5480 members.

⁶ In Tables we report the number of useful responses as (n=...). For example (n=126) means that 126 useful responses were analysed.

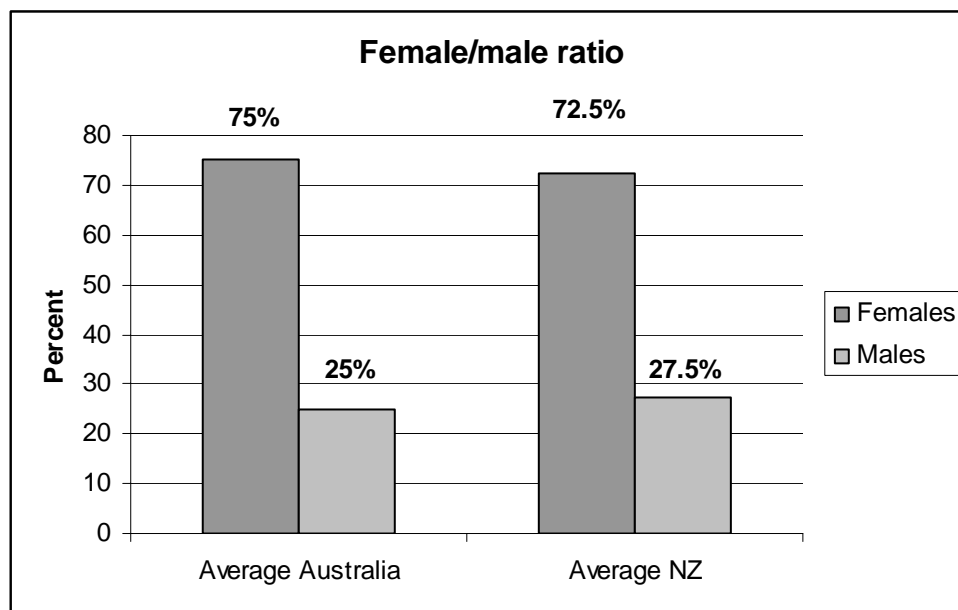
in the North Island has 625 members. The large NZ U3As appear to place no constraints on maximum membership size.

Female/male ratio	<i>What is your approximate membership percentage by sex?</i>
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Women are better joiners than men in almost all retirement organizations and U3A is no exception. In a study carried out of 12 U3A groups in three Australian States (Swindell, 1992) females outnumbered males by an average of 5:1; (range: high 10:1; low 3:1). The 12 U3As in that study had all been running for six or less years. Thirteen years later, a study of U3As in Victoria (where U3A is widely known) reported a considerably improved female/male ratio; on average, about 3:1 (Hebestreit, 2006).

Chart 2 shows an average female/male ratio of about 3:1 for both Australia and NZ. It seems that U3A is becoming better accepted by men now that the concept is better understood.

CHART 2: Average female/male membership ratio for Australia and NZ



Age of members	<i>Some U3As have approximate data about members' ages. If so please supply the following.</i>
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Knowledge of members' ages would be a useful statistic for at least two purposes. First, U3A managers need to know whether their groups are attracting sufficient numbers of younger retirees with the new ideas and energy to renew the volunteer base on which U3A depends. There are many examples of once popular organizations for retirees which became defunct because management failed to react to social changes taking place within the

wider ageing population (Swindell and Mayhew, 1998). Senior citizens clubs and bingo clubs are examples.

A second reason for management to know the general age range of its members is to identify whether U3As are retaining an appreciable number of members from the oldest age groups. Research shows that the kinds of things U3As do so well, namely providing very low cost, cognitively and physically stimulating activities within a social setting, help older people to maximize their chances for ongoing independence. However, age-related difficulties that become more pronounced in later years, like mobility difficulties, giving up driving, care giving duties and so forth, often cause many of the oldest members to prematurely leave leisure organizations that play an important part in their well-being. Management practices like car pooling, applying for grants to purchase and install auditory aids in teaching spaces, improved lighting, and locating some teaching and social events in more accessible community places are among the ideas that U3As have introduced to ensure that the oldest members continue to feel welcome.

Attracting recent retirees and being proactive in retaining the oldest members are not mutually exclusive ideas. Innovation can occur without neglecting the traditional activities that continue to appeal to older members. Age-related membership data are needed in order to monitor progress in these areas.

Society has moved strongly towards a user-pay approach for services in the past few years. This has had an impact on many U3As. For example, formerly free or heavily subsidized teaching spaces are often now charged for at commercial rates and U3As have been forced to pass the cost on to members. Later in this report data are shown that 78% of Australian U3As and 43% of NZ U3As believe U3As should accept government resources or assistance to help them to maintain their service to members. Being able to cite membership numbers that attest to the fact that they are continuing to provide an important, very low cost, social service for significant numbers of the ageing population would assist U3As to mount a case for appropriate support.

Few U3As currently ask their members to specify their age grouping when they renew and the number that could provide accurate membership age groupings was too small for useful analysis in this survey. It is likely that most members would provide age range information if they were given a brief explanation of why it is needed.

It is recommended that, in the future, all U3As provide an optional tick-a-box section where members can tick their age ranges, each time they renew their membership.

Australia's largest free-standing U3A, U3A ACT, has 3700 members. It recently updated information about members' ages and the details are shown below. One quarter of members were younger than 65; 14% were 80 and older. Clearly, U3A ACT's diverse range of courses and resources appeal to members across a very wide age range.

Reprinted with permission from ACT July 2009 newsletter

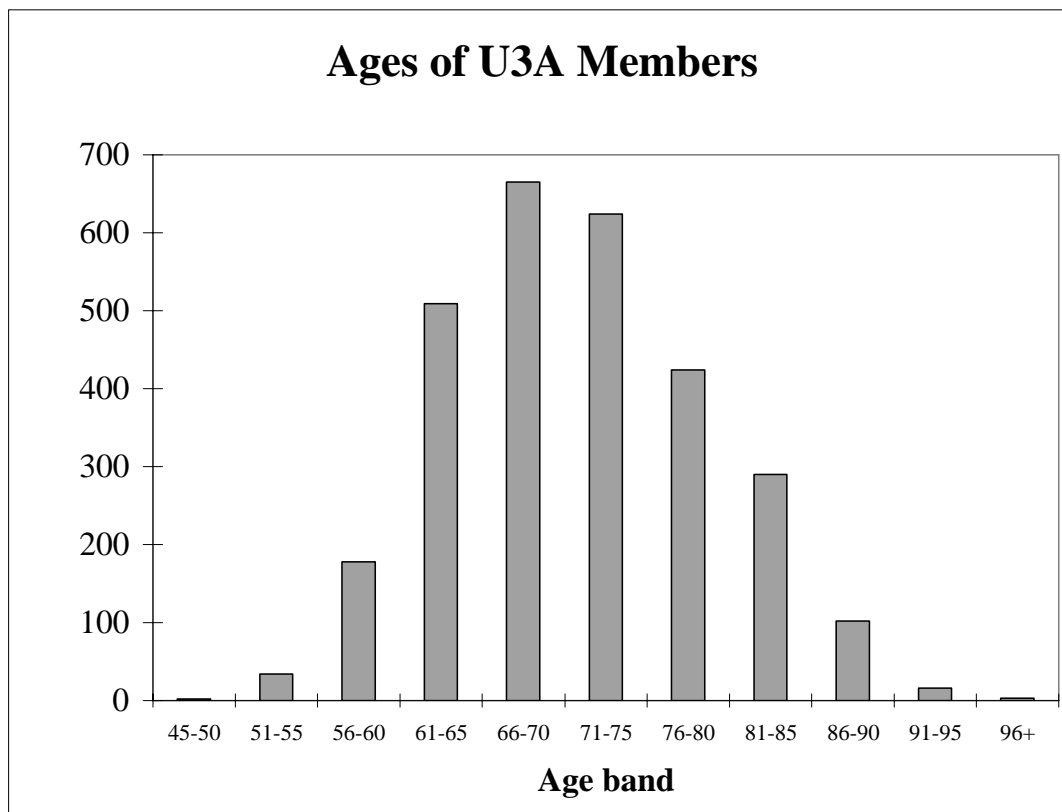
(a) Age distribution of U3A members

Some of you might have wondered why we asked for your date of birth in our last round of membership renewals. The reason was that we had no idea of the distribution of ages in our membership – information which could be useful in arguing our case for greater recognition by governments of the value of organisations like U3A.

Most of you provided this information on your renewal forms, so we now have a better idea of how old (or young) we are. Regrettably, we missed a number of new members because they were using an old Application for Membership form; we will catch up with them in the next round of membership renewals.

However, we thought you might be interested in the age spectrum of the 2850 of our 3700 members for whom we know year of birth.

The average age of these 2850 members is 71.3 years: we are definitely a seniors organisation! This figure shows the age distribution in 5 year bands. According to these data, there are 121 members aged 86 or more (three of these were 96 or more); we don't know how many of these are active members, but at least they see the value in still belonging to U3A.



On the basis that new members are likely to be at the lower end of the age range, we expect that the data provide here is probably biased a little upwards (older) from that pertaining to the overall membership. We'll give you an update in a year's time, when we hope to know everybody's year of birth.

Recruitment	<i>Does your U3A actively seek to attract new members?</i>
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Many U3As use a range of approaches to actively recruit new members. Table 7 shows the percentage of groups in each country that actively recruit members.

TABLE 7: Active recruitment of members

	Yes	No
Australia (n=123)	92%	8%
NZ (n=38)	73%	27%

A variety of methods are used to recruit members. The most common of these are: advertising in the media; word of mouth (not really an active recruiting method unless members and others are asked to spread the word); brochures; displays; and, special promotions.

The full list of recruiting methods given is shown in the appendix.

Orientation	<i>Does your U3A provide any orientation or support for new members?</i>
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Table 8 shows that more U3As provide orientation activities for new members in Australia (70%) than NZ (54%). Orientation would presumably be more important in large U3As with diverse programs run from several locations, than for small U3As.

TABLE 8: Orientation activities for new members

	Yes	No
Australia (n=122)	70%	30%
NZ (n=38)	54%	46%

Annual membership fees	<i>How much is your annual membership fee?</i>
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Annual membership fees were surveyed with the intention of reinforcing the point that U3As provide members and indirectly the wider community with a valuable social service at very low cost.

Some groups keep their annual membership fees very low by charging members additional fees for services like teaching, printing, and room hire, whereas other groups include most of these costs in a single higher annual fee. Levels of in-kind assistance, such as free or subsidised teaching and office space, also vary widely from group to group and have a major influence on the level of membership fee.

Table 9 summarises membership fees for both countries.

TABLE 9: Annual membership fee

	Average	Range
Australia (n=126)	\$29	\$10-50
NZ (n=38)	\$17	\$5-35

Annual fees charged in Australia vary widely, ranging from a low of \$10 to a high of \$50. The two most common Australian fees in 2008 were \$25 (n=27) and \$30 (n=30). In NZ the two most common membership fees in 2008 were \$10 (n=14) and \$20 (n=10). Some groups indicated they were able to keep fees very low because sponsoring groups like town councils covered the cost of printing and distributing newsletters.

About 48% of Australian U3As and 38% of NZ U3As offer discount membership fees for joint membership.

Additional fees	<i>Apart from your annual membership fee do members pay for other U3A services?</i>

Earlier in this report it was noted that society has moved sharply towards a user-pay approach for services in the past few years. Table 10 shows that a large majority of U3As now levy members for additional services.

TABLE 10: Payment for additional services

		Yes	No
Do members pay for other U3A activities or services?	Australia (n=126)	84%	16%
	NZ (n=36)	89%	11%

U3As which levy members for additional services were asked to provide brief details of the charges. These are summarised in Tables 11A and 11B.

TABLE 11A: Details of Other Service Fees: Australia (n=106)

Type of service	Frequency	Cost
Course materials	59	\$5-\$50
Accommodation	39	\$1-\$45
Refreshments	30	\$0.5-\$10
Excursions & transport	24	\$10-\$20
Computer	20	\$20-\$50
Course	19	\$2-\$20

TABLE 11B: Details of Other Service Fees: NZ (n=32)

Type of service	Frequency	Cost
Venue	15	\$0.5-\$1
Refreshments	11	\$0.5-\$2
Courses	8	\$2
Notes	7	\$3-\$6
Others (materials, social, computers)	19	

Additional charges are considerably higher in Australian U3As than they are in NZ U3As.

Existing support from external agencies	<i>What levels of support or in-kind assistance etc does your U3A currently receive or has recently received from persons/organisations external to your U3A, and from whom?</i>
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Grants and in-kind assistance

Unlike most adult education approaches the self-help U3A model is not dependent on the vagaries of agency or government funding. However, many groups are heavily reliant upon substantial in-kind support from organisations that are sympathetic to the U3A ideal. Support such as free or subsidised teaching and administration space, subsidised newsletter printing, or access to specialised teaching resources like computers is not as widely available as it was in the 1980s and 1990s, but nevertheless many community groups still provide considerable levels of assistance to help U3As to keep their annual membership fees at the low levels shown earlier. Because the majority of retired people have fixed and often very limited incomes, it is important to maintain low membership fees. The current membership fees and levies

discussed earlier would be unlikely to deter any but the most impoverished would-be member.

Table 12A and Table 12B show the kind of support provided to Australian and NZ U3As by external organizations.

TABLE 12A: Australian U3As: Grants or in-kind support received

	Accommodation		Services		Grant		Equipment	
	Ongoing	One off	Ongoing	One off	Ongoing	One off	Ongoing	One off
n = 90 (71%)								
City/shire council	19	2	22	2	19	15	2	2
State Govt.	6	2	7	2	14	8	0	0
Tertiary	8		3		3		0	
Federal Govt.	1		4		1	3		1
Other	24	4	11	5	14	19	1	2

TABLE 12B: NZ U3As: Grants or in-kind support received

	Accommodation		Services		Grant		Equipment	
	Ongoing	One off	Ongoing	One off	Ongoing	One off	Ongoing	One off
n = 15 (39%)								
City/shire council	3		3	1	1	3		
NZ Post	2		7	2	1	3		1
Tertiary		1	2	3	1	1		
Other			3	1				

Some groups expressed opposition to receiving support of any kind, a position that is more prevalent among NZ groups than Australian groups. Seventy-one percent of Australian U3A groups receive external assistance in some form whereas only 39% of NZ U3A groups receive external assistance. Several objections to grants and in-kind assistance were raised on the grounds that this kind of support is transient. For example, concern was expressed that many U3As rely on subsidised teaching and administration space and are therefore vulnerable to market forces.

This is a valid concern for most adult education models. There are many examples of successful adult education programs that immediately collapsed once external funding was removed. However, the self-help U3A approach can't be compared with organizations which have paid staff and formal structures. The volunteer underpinning of the self-help movement and the informality of U3A structures allow groups to quickly adapt to difficult circumstances, and there are many examples of U3As having done just that.

Research studies point to improvements in health and general well being when older people keep their brains active, exercise regularly, maintain social networks and engage with life by doing interesting things. These attributes are part and parcel of most U3A programs. Therefore it can be argued that U3As are providing a low cost preventative health service for members which in turn translates into savings in national health expenditure. Provided that the self-

help nature of U3A remains the dominant philosophy, there are sound arguments in favour of grants or in-kind support that enable U3As to keep costs to a minimum. As shown in Table 13 later, many U3A leaders now believe that grants and external support that assist groups to provide increased and better services for greater numbers of older learners are philosophically supportable.

Difficulties faced by management committees	<i>List the three most important problems or difficulties which your management committee has to deal with. (List the most important first.)</i>
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Participants were asked to list in order of importance the three most important problems or difficulties dealt with by their Management Committees. Not all groups responded to this item and, of those that did, many did not list three items. The most important difficulties cited were:

- Lack of appropriate accommodation (50%);
- Filling committees (43%);
- Finding tutors/leaders (43%).

A number of people completing this item noted that volunteers were currently working at close to maximum capacity.

Future support from external agencies	<i>Imagine a future situation in which a government or adult education agency offered some regular financial assistance or resources to assist U3As. Do you believe that assistance of this nature should be accepted by U3As?</i>
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The guiding principles on which the self-help U3A ideal were first founded in the UK in 1981 provide a philosophical basis rather than a hard and fast set of rules to be rigidly followed by U3As. Consequently there are many variations of the self-help approach even within groups which are geographically very close. Participants were asked a hypothetical question about regular external support for U3As. Those that answered "yes" to regular external support were asked to explain how they might use these resources to address any of the three main difficulties identified earlier. Participants answering "no" were asked to give reasons for their opposition.

TABLE 13: Support for U3As

		Yes	No
Should U3As accept regular government or agency support if it were available?	Australia (n=123)	78%	22%
	NZ (n=38)	43%	57%

More than three quarters of Australian U3As (78%) indicated they would accept some regular government or agency support if it were available. This contrasts sharply with the NZ position where a minority of U3As (43%) support

the idea. This difference in views between the two countries which espouse the same self-help U3A ideal and share information via conferences, *U3A Signposts* and regular exchange of newsletters seems to stem from some long-standing position held by U3A leaders. A similar question was asked of U3As during a 1997 survey, and similar contrasting views were found. In that 1997 survey half of the 14 NZ U3As which responded to the question, were opposed to the idea and half supported it. In contrast 73% of the 81 responding Australian U3As supported the idea and 27% opposed it. Thus, differences in views on government support have widened since the first survey 11 years ago.

Participants who were opposed to government or agency support were asked to indicate why they were opposed. Their views are summarised in Table 14

TABLE 14: Reasons why U3As should decline external assistance

Australia (n=28) (22% of sample)	
Loss of autonomy	61%
Bureaucracy leading to problems	29%
Contrary to self-help ethos	25%
Difficulties are not financial	14%
No need for financial assistance	11%
NZ (n=19) (51% of sample)	
Loss of autonomy	32%
No need for financial assistance	26%
Bureaucracy leading to problems	11%
Other reasons	21%

Why is there a marked difference between U3As in both countries in attitudes towards external funding? A possible explanation for strong Australian U3A support for the hypothetical government funding scenario is that responsibility for funding community education programs like U3A lies with each of the eight independent State/Territory governments. Thus, there are eight times more opportunities for significant government funding, and hearing about and observing the effects of such funding in Australia than there are in NZ. Not all State/Territory governments are visionary in their support of later life adult education. However, two of the three state U3A networks have received generous support to grow the movement regionally, and information about the usefulness of these grants spreads quickly by electronic and conventional newsletters. In the case of the U3A Network-Victoria, which for many years has received significant funds annually to grow the movement within Victoria, its leadership in U3A development in Australia is widely recognized. Few U3A

leaders today could argue that annual funding in Victoria has been to the detriment of U3As in Australia.

Those who supported the hypothetical question of regular government funding were asked how the funds would be used to address difficulties they have to deal with. The major items are summarised in Tables 15A and 15B. Minor items, which collectively were mentioned by many of the participants, are shown in the appendix.

TABLE 15A: How Australian U3As would use government or agency assistance if it were available (n=87)

Accommodation/venue hire	64%
Purchase equipment	33%
Pay some presenters/administrators.	20%
Publicity	14%
Transportation	13%
Other	70%

TABLE 15B: How NZ U3As would use government or agency assistance if it were available (n=13)

Accommodation/venue hire	54%
Purchase equipment	23%
Pay some presenters/administrators.	23%
Publicity	15%
Other	62%

Difficulties associated with accommodation dominate responses in both countries. It seems inevitable that rent for commercial spaces and costs for accessible meeting halls and teaching facilities will continue to rise. The 'positive contribution that U3As are making to older persons' health and well-being is difficult to quantify.

Greatest accomplishments	<i>What do you believe are the three greatest accomplishments of your U3A? (List the most important first.)</i>
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Participants were asked to list their U3A's three greatest accomplishments. This resulted in a large number of different descriptions for the same general accomplishment and many of these were consolidated into the major categories listed in Table 16A and 16B. For example, the category - *Social networks* - was formed by consolidating any reference to the importance of social contact (e.g. friendships, congenial company, opportunities to mix with like-minded people etc).

TABLE 16A Major accomplishments by Australian U3As (n=123)

Category	Percent
Intellectually stimulating opportunities	85
Social networks	51
Increasing membership	36
Increasing recognition by community	24
Special projects	12
Survival of branch	7
other	73

TABLE 16B: Major accomplishments by NZ U3As (n=38)

Category	Percent
Intellectually stimulating opportunities	95
Social networks	57
Increasing/maintaining membership	24
Keeping fees low	8
Survival of branch	8
other	57

As might be expected of an organization whose principal role is the provision of intellectually stimulating activity within a social environment, both those categories were at the top of the list of accomplishments for both countries. It is interesting to note that both large and small U3As alike rate social networking as very high among their major accomplishments. Large membership size is not seen as a major barrier to effective social networking within most of the largest U3As.

U3As in both countries rated *Increasing membership* as the third major accomplishment.

Future accomplishments	<i>Within the next five years what are the main things you would like your U3A to have accomplished?</i>
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Participants were asked to list their groups' hoped for accomplishments within the next five years. Responses are summarised in Tables 17A and 17B. A large number of aspirations were given and the full list can be found in the appendix.

**TABLE 17A: Desired accomplishments within the next 5 years:
Australia (n=122)**

Category	Percent
Maintain or add membership	60
Wider range of courses	57
More or permanent accommodation	39
Wider community recognition	19
Greater use of technology	18
More member involvement/volunteerism	10
Attract younger members	10
Other	93

**TABLE 17B: Desired accomplishments within the next 5 years:
NZ (n=36)**

Category	Percent
Maintain or add membership	53
Wider range of courses	50
More member involvement/volunteerism	17
Attract tutors/leaders	11
Attract younger members	11
Enhanced use of technology	11
Other	81

Teaching

The laissez faire teaching approach adopted by self-help U3As has been discussed at a number of U3A conferences. Occasional suggestions have been made that U3As should adopt a more formal approach to teaching and learning, and focus on "higher standards" and "more rigorous subjects". Generally such suggestions have been strongly rejected by conference attendees.

A number of questions were asked to gauge a management view of the current U3A teaching/learning environment.

Teaching in homes	<i>Approximately what percentage of your activities is held in members' homes?</i>
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TABLE 18: Percentage of activities held in members' homes

	Over 80%	61-80%	41-60%	21-40%	1-20%	None
Australia (n=124)	0%	2%	4%	10%	50%	34%
NZ (n=38)	19%	32%	16%	8%	8%	17%

As shown in Table 18, 66% of Australian groups and 83% of NZ groups run at least some courses from private homes. NZ groups make much greater use of this resource than Australian groups, perhaps reflecting the preference by NZ management for small groups servicing a reasonably tight geographical area. About half of NZ groups run at least 60% of their courses from tutors' homes. One NZ group offers all its courses from private homes.

The self-help U3A format is an ideal one for making greater use of teaching in members' homes. The cost and difficulty of finding suitable teaching space is not a major consideration as could be the case with centralized teaching. Timetabling is normally not a major deterrent. In addition, regardless of whether the U3A campus is large or small, the all-important social networking element is a major factor associated with small group teaching in member homes. A possible downside of home teaching is that it may make it more difficult for older members with transport or mobility difficulties to attend their chosen activity if the venue is not close to convenient public transport.

Course content	<i>Recent research shows that physical activities help keep the brain as well as the body stimulated. Ideally, what types of emphasis should be placed on the majority of U3A activities?</i>
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Participants were asked to tick one of three boxes indicating whether courses should be:

- Academic in nature;
- Almost any type of activity is suitable so long as it fits broadly within the U3A ideal of providing intellectually challenging pursuits within a social setting;
- Some other option.

Responses are summarised in Table 19.

TABLE 19: Desired content in U3A courses

	Academic	Any	Other
Australia (n=126)	2%	97%	1%
NZ (n=38)	16%	84%	0%

Responses are strongly in favour of maintaining the laissez-faire approach to course content. A number of comments were made that members would not continue to attend a course that did not meet their needs, and this was the only regulatory mechanism needed. (The matter of monitoring courses and teaching is addressed later in this report.)

Tutor background	<i>What kind of group leader/convenor/tutor is most appropriate for your U3A?</i>
-------------------------	---

Participants were asked to tick one of three boxes indicating whether a tutor should be:

- A person with prior teaching/tutoring background;
- Any member who has something to offer, regardless of prior background;
- Some other option.

Responses are summarised in Table 20.

TABLE 20: Preference for tutors' qualifications

	Academic	Any	Other
Australia (n=126)	4%	94%	2%
NZ (n=38)	5%	95%	0%

Tutors' formal qualifications are not an important issue to the large majority of U3As. More than 90% of participants from both countries chose the "Any" option, which further substantiates the laissez faire approach to the teaching-learning environment.

Monitoring activities	<i>How does your U3A monitor its activities and teaching?</i>
------------------------------	---

Participants were given 3 statements related to the monitoring of teaching and other activities within their groups and asked to tick as many of the statements that applied.

- Feedback sought from participants and/or group leaders;
- "Market forces" (e.g. if members don't like an activity or leader they leave and the class winds up without need for monitoring);
- Some other option.

Responses are summarised in Table21.

TABLE 21: How U3As monitor their activities

	Feedback	Market forces
Australia (n=124)	85%	66%
NZ (n=38)	72%	64%

Participants could check any or all of the three options. Most U3As have some form of formal or informal feedback but it would seem that the “market forces” option is also a widely used method. Very few responses listed other forms of evaluation. Those that did included a review panel and the monitoring of attendance sheets.

Specialist activities	<i>How does your U3A presently cope with member requests for specialist activities involving expensive or scarce equipment e.g. computers, photography?</i>
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U3A members have shown considerable interest in learning about technologies such as computers, the Internet and digital photography; however, few U3As have the resources to purchase specialised equipment to cater for members' interest in learning about new developments. Participants were asked how they attempted to overcome the problem of a scarcity of resources needed to meet new demands by members.

TABLE 22: How groups cater for activities involving expensive or scarce equipment

Australia (n=96)	%
Referral to other organisations	19
Apply for funding	16
Class contributions	15
Member fees	11
Hire equipment	4
Other	35

NZ (n=25)	%
Referral to other organisations	32
Class contributions	32
Member fees	8
Other	28

Most sought-after courses	<i>List in order of member demand the 5 most sought-after courses in your U3A (e.g. beginning computers, a language, walking for pleasure, using the Internet, history etc)</i>
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Tables 23A and 23B list the most sought-after courses by country.

TABLE 23A: Most sought-after courses – Australia (n=117)

	Australia						
	1 st	2 nd	3 rd	4 th	5 th	Sum	%
Computing	31	13	5	4	6	59	50
History	21	8	9	10	5	53	45
Languages	5	9	15	7	8	44	38
Exercise	6	14	10	10	1	41	35
Arts & crafts	5	11	4	10	8	38	32
Music appreciation	6		10	6	6	28	24
Literature	1	5	3	5	11	25	21
Other						257	

TABLE 23B: Most sought-after courses – NZ (n=35)

	NZ						
	1 st	2 nd	3 rd	4 th	5 th	Sum	%
History	6	4	6	4	2	22	63
Music appreciation	1	6	5	1	3	16	46
Art appreciation	2	3	3	4	4	16	46
Current affairs	6		3			9	26
Science	1	4	1	3		9	26
Armchair travel	2	2	2	1	1	8	23
Book groups	3	2	1	1		7	20
Other						76	

Computing is the most sought-after course in Australia, but does not feature as a main choice in NZ. The difference may be largely due to the fact that many Australian U3As operate from “their own” premises and have applied for one-off grants to purchase expensive equipment which can be securely housed in their insured premises. Many NZ U3As do not operate from central, single-purposes premises but share their meeting spaces throughout the week with other organizations.

Another notable difference is the popularity in Australian U3As of exercise related courses like dancing, walking for pleasure, aquaerobics, and yoga.

Studies that point to a positive relationship between exercise and brain function in later life support the position of those U3As that include exercise activities among the many Successful ageing activities they currently provide for members.

Another possible reason why exercise and computing activities do not feature strongly among NZ offerings is that these activities are offered elsewhere in the local community and many U3As see no reason to duplicate them. Other U3As, however, argue that duplication of activities run elsewhere simply provides more opportunities for U3A members to do more things thereby strengthening the overall value of the organisation to members. Whatever the reasons, there are no hard and fast rules on what U3As can and cannot offer.

A large number of other activities are included in the all-encompassing category of *Others* in the above tables and these are listed in the appendix. The extent of these activities, all freely provided by skilled retirees for the benefit of members, underscores the social and financial value of the self-help U3A approach to the wider community.

Social networks	<i>Many members say they are attracted to U3A because they want to mix with like-minded people. List the main ways your U3A fosters social networking.</i>
------------------------	--

Maintaining social networks (or establishing new social networks when former social networks are broken), is one of the five important criteria for Successful ageing discussed in the introduction to this report and U3As in both countries rate social interaction highly among the most important characteristics of their groups. Tables 24A and 24B show the main social networking activities promoted within U3A groups.

TABLE 24A: Main social networking activities in Australian U3As

Australia (n=122)	
Activity	%
Social events	83
Tea/coffee chat	53
Study groups/meetings	15
Excursions/day trips	12
Other	65

TABLE 24 B: Main social networking activities in NZ U3As

NZ (n=37)	
Activity	%
Social events	64
Tea/coffee chat	50
Study groups/meetings	50
Guest speakers	17
Excursions/day trips	17
Other	22

Use of the Internet	<i>The Internet has vast potential to provide U3A members with free learning/teaching resources. Does your U3A use the Internet for learning/teaching resources? Please explain.</i>
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Although the Internet has considerable potential for increasing the range of learning and socializing experiences available to older people, a “grey digital divide” prevents many older retirees from experiencing “what might be”. For example, a 2009 Australian Communications and Media Authority report on Internet usage states 87% of all Australians have used the Internet. Of the 13% who have never used the Internet, 47% are aged 65 and older.

Table 25 shows Internet use by Australian and NZ U3As.

TABLE 25: Use of Internet by Australian and NZ U3As

Australia (n=113)	
	%
Do not use	37
Research	35
Computer classes/internet	17
Limited use	11

NZ (n=37)	
	%
Do not use	36
Research	31
Limited	12
U3A Online	12
Course material	10

Neither Australian nor NZ U3As are high end users of the Internet for learning and teaching resources. The responses *Do not use* and *Limited use* account for 48% of responses in both countries.

The Internet is a routine part of younger cohorts' working and social lives and as they move into retirement the large majority will continue to rely on the Internet for many of their daily activities. U3As which don't attempt to cater for the major social changes brought about by the Internet may find it difficult to attract younger retirees.

U3A Online resources	<i>Does your U3A make use of resources provided by U3A Online to support U3As in Australasia (e.g. Signposts, Locate a U3A, Course Site Licences for teaching etc)?</i>
-----------------------------	---

U3A Online was founded in 1998 with one of its principal objectives being the provision of resources to assist Australian and NZ U3As to meet their educational objectives. *Locate a U3A*, and its predecessor the *Directory of U3As in Australia and New Zealand* published annually in hardcopy from 1991-1999, has been the only systematic and regularly updated database of U3A contacts in Australia and NZ. These details have allowed many U3As to share newsletters and other U3A-related information which have lowered the barriers to inter-U3A cooperation and understanding within and between both countries. *Signposts* is a monthly email newsletter jointly edited by WorldU3A and U3A Online for the benefit of U3A groups and individual members. It contains details of free Internet resources, many of which would be of assistance to tutors. *U3A Online Site Licences* allow U3A groups in both countries to make unlimited copies of more than 30 high quality U3A Online courses, for face-to-face teaching within individual U3A. U3A Online has also undertaken a number of research projects.

Table 26 summarises the use made by U3As of U3A Online resources.

TABLE 26: Use of U3A Online resources

		Yes	No
Does your U3A make use of U3A Online resources?	Australia (n=119)	35%	65%
	NZ (n=31)	32%	68%

A number of useful suggestions were made regarding ways in which U3A Online could better assist U3As. However, many of the suggestions made propose resources that U3A Online currently provides.

Despite a history of supporting U3As, U3A Online remains poorly understood by many management committees. Anecdotal reports suggest that many U3As lose their knowledge of U3A Online resources and support as new leadership is elected at an AGM.

U3A Online

www.u3aonline.org.au

U3A Online is the world first virtual U3A. It started in 1998 and since 2001 has operated like any U3A; that is, with an all-volunteer workforce. The major difference is that no one meets face-to-face; all teaching and administration is carried out by volunteers who can live anywhere. For example, members of the management team have come from Poland, the UK, NZ and Australia. Since 2001, Griffith University in Brisbane has freely hosted U3A Online as part of its community service. All courses and interaction are freely delivered through the university's sophisticated flexible learning and teaching software.

From its inception U3A Online has provided resources for U3As in Australia and NZ to assist them to meet their educational objectives. The best known free resources are "Locate a U3A", which is the only systematic way for U3As in both countries to contact each other; and *Signposts*, the free monthly email newsletter jointly edited by U3A Online and World U3A. Other free resources include *Research/Reports* which contains downloadable published papers about U3A and positive ageing; *Ideas Exchange*; *Links*; and *News and Events*. All resources are accessible from the home page.

For many years membership was strongly focussed on isolated people, for example those isolated by distance or circumstance (e.g. being a carer, disabled or ill). However, in 2009, membership was opened to all older persons and younger disabled persons. This step was taken in the belief that cyberspace lowers many disability barriers and therefore greater benefits will flow to isolated members through the development of more and varied resources which are provided by a larger volunteer base. The all volunteer service provision and Griffith hosting allows membership costs to be kept to A\$25 and this gives members access to more than 30 excellent courses and other resources at no additional cost.

I am partially blind with limited short sight. I am extremely grateful to U3A Online as I now have an interest at home - am happy working on my own and life has again a meaning.

I live in (suburb of large city) with bad bus service. Have no family support. Have become more disabled and in constant pain over the last couple of years

I'll go as far as to say that being totally absorbed in my most recent online course has saved my sanity this year.

In 2008 U3A Online was part of a partnership of four organisations which won the Australian Government \$15 million Broadband for Seniors tender. Funding is for up to 2000 Internet Kiosks throughout Australia to assist many of the 45% of Australians over the age of 65 who have never used the Internet, to come to grips with this powerful enabling medium.

Site licences

Individual U3As may join U3A Online as member organisations. Member organisations may apply for *Site Licences* to any course. For \$20/licence/course/year a licence permits member U3As to print as many copies of the course materials as they require for face-to-face teaching in their own U3A. In many cases the course notes run to more than 100 pages. Participants may keep their notes so the cost of copying provides them with a valuable, high quality reference. Current courses include:

- Ageing and Retirement
- Antarctica
- Astronomy
- Australian Flora
- Australian History 1
- Autobiography and Journaling
- Basic English Grammar
- Botany for Knowledge and Enjoyment
- China in Transition: From Mao to Now
- Continents on the Move
- Design in Your Life
- Food for Thought
- Genealogy Online
- Human Biology
- Introduction to Western Philosophy
- Left, Right or Centre: A very brief introduction to political ideologies
- Maintaining Independence
- My Life Story
- Myths and Legends
- Practical Psychology for Relationships
- Religions of the World
- Renaissance Italy
- Resources for the Future – Renewable and Non-Polluting
- Saving the Soil
- Storytelling with Pictures
- The Evolution of life on Planet Earth
- The History and Spread of the English Language
- The Night Sky
- The Northern Sky
- The Romans
- The Shaping of the Modern Mind
- Thoreau Emerson and the Conduct of Life
- Unleashing Your Creative Spirit
- Writing Family History
- Writing for Pleasure

Research

U3A Online has undertaken many substantial research studies and the results have been published in books and academic journals. This Australian and NZ U3A research study was initiated and fully funded by U3A Online.

Background of office bearers

Please describe as accurately as possible the kinds of occupations held by current major office bearers immediately before their retirement (e.g. carpenter, business owner, accountant, home maker, etc.)

Earlier studies have shown that U3A attracts people with better than average education levels when compared with those of the general ageing population. It seems reasonable to speculate, therefore, that the energy and vision displayed by so many U3A administrators would be associated with high levels of education, expertise and experience gained during their working lives.

Participants were asked to describe as accurately as possible the kind of occupations that current major office bearers had held immediately before their retirement. The diverse occupations were then grouped into one of 4 major categories of:

- Professional – i.e. occupations entailing study at a university or equivalent;
- Trade – i.e. occupations requiring a certificate or qualification not normally involving university study;
- Home-maker;
- Business e.g. small business owners/employees.

The former occupations of U3A office bearers are shown in Charts 3A and 3B. The charts are interpreted as follows. Chart 3A, for example, shows that of 122 responses 85 presidents were formerly from the professions, 28 were from a business background, 7 were from trade backgrounds and 2 were formerly home- makers. The former occupations of other office bearer are interpreted in a similar way.

CHART 3A: Former occupations of major office bearers in Australian U3As

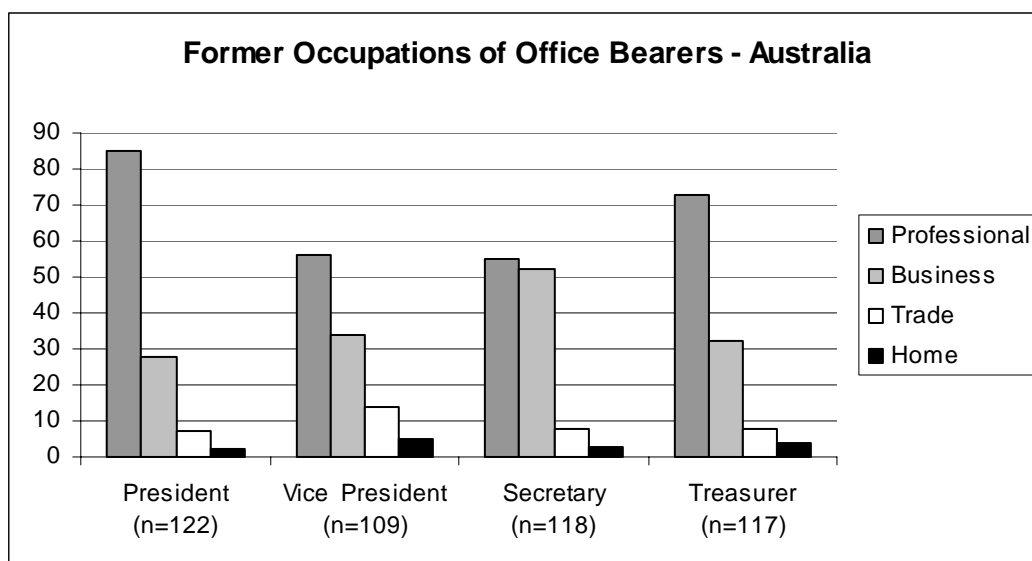
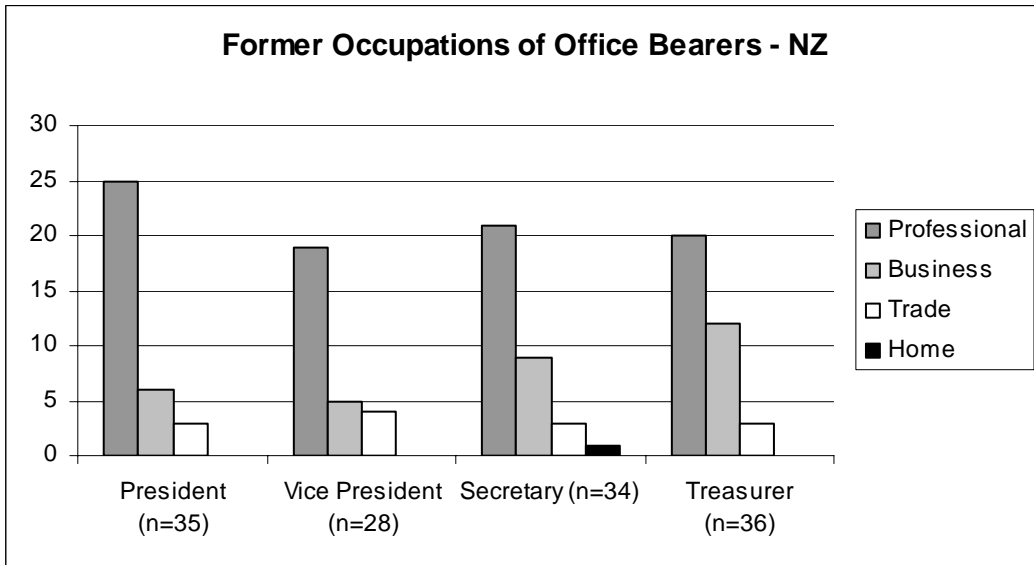


CHART 3B: Former occupations of major office bearers in NZ U3As



Charts 3A and 3B show that the great majority of office bearers come from paid working life backgrounds that are likely to have involved extensive decision-making and adaptability. These are among the attributes that are also fundamental to the success of an all-volunteer organisation like U3A.

V Calculating a monetary value for U3A voluntarism

The following steps detail the process of calculating a monetary value for U3A volunteer expertise.

Teaching year

Each U3A provided details of the duration of its teaching year. Table 27 outlines these details for Australia and NZ.

TABLE 27: Duration of teaching year

	Average (Weeks)	Range (Weeks)
Australia (n=122)	38	20-52
NZ (n=34)	38	24-48

There is no single model for how a U3A should operate; consequently U3As program their activities in different ways. The average teaching year in Australia is about 38 weeks. However, the range is quite wide with 18 groups offering activities for 30 or fewer weeks annually, and six groups providing a very long teaching year of between 47-52 weeks. Over 60% of Australian groups run a teaching year of between 34 and 40 weeks.

The average teaching year in NZ is also 38 weeks with a range of 24-48 weeks. More than 60% of NZ groups run a teaching year of between 34 and 40 weeks.

Teaching hours

Total teaching hours were calculated for each U3A by multiplying together the following three pieces of information provided by each U3A:

1. duration of teaching year in weeks;
2. average number of courses run during a typical teaching week;
3. number of hours of teaching during a typical teaching week.

The following example illustrates the process for an imaginary U3A

Annual teaching hours for an imaginary U3A group

1.	Duration of teaching year	10 weeks
2.	Average number of courses per week	5 courses
3.	Average hours of teaching per course	2 hours
	Total teaching hours per year	100 hours

Multiplying the three items shows the imaginary U3A provided a total of 100 hours teaching each year.

Similar calculations were run for each of the 120 Australian and 32 NZ groups which supplied usable data. Total teaching hours of regular weekly courses were then added to provide the weekly teaching total hours for responding U3As, as shown in row 1 of Tables 28A and 28B.

In addition to the regularly scheduled courses, many U3As also run occasional courses such as a variety of excursions, historical visits, dance/exercise lessons and so forth. If these occasional courses were conducted by volunteer member tutors,⁷ rather than external tutors. U3As were asked to itemise each of these occasional activities and to estimate an annual tutor hour commitment. Total hours for these occasional activities are shown in row 2 of Tables 28A and 28B.

Total teaching hours were obtained in row 3 by adding row 1 and row 2.

Teaching requires considerable preparation time; some U3A tutors report spending five or more hours preparing for each hour of actual teaching. Preparation time has been estimated by including a conservative figure of two hours of preparation for every hour of face-to-face teaching. Row 4 accounts for the preparation hours and was obtained by doubling the total in row 3.

Finally, row 5 of Tables 28A and 28B shows the total volunteer tutor hours obtained by adding rows 3 and 4.

TABLE 28A: Total teaching hours by U3A member tutors in Australian U3As

		Hours
1.	Weekly courses (120 U3A groups)	215,125
2.	Occasional courses (87 U3A groups)	7,319
3.	Total teaching hours (row 1+row 2)	222,444
4.	Total preparation hours (row 3x2)	444,888
5.	Total volunteer tutor hours (row 3+row 4)	667,332

TABLE 28B: Total teaching hours by U3A member tutors in NZ U3As

		Hours
1.	Weekly courses (32 U3A groups)	17,398
2.	Occasional courses (16 U3A groups)	696
3.	Total teaching hours (row 1+row 2)	18,094
4.	Total estimated preparation hours (row 3x2)	36,188
5.	Total volunteer tutor hours (row 3+row 4)	54,282

⁷ In this report the term tutor has been used to refer to any U3A member who organises and/or runs a U3A course. Tutor has been used for convenience although the volunteers who run U3A courses are referred to by a variety of names including teachers, convenors, tutors, facilitators, coordinators and so forth. Many U3A groups have specialist courses run by non-U3A member tutors. Non-member contributions are not counted in the following analysis of U3A voluntarism.

Management hours

The number of courses on offer in any week is a matter of record within each U3A. Therefore it would have been a relatively straight forward task for each U3A to provide the details of voluntarism associated with teaching shown in Tables 28A and 28B. In contrast, the variety of essential tasks carried out by other skilled volunteers, and number of hours committed to each task are not normally a matter of record within each U3A. To prompt U3As to count the many volunteer hours that underpin the effective operation of any U3A, participants were asked to fill out a number of tables that would allow identification and calculation of all specific tasks regularly carried out by volunteers. For example, an imaginary U3A group that held 10 Management Committee meetings a year, each lasting 2 hours on average and having 7 members on the committee would have supplied the following numbers.

Annual meeting hours for an imaginary U3A Management Committee

1.	Number of meetings per year	10
2.	Average duration of meetings (hours)	2
3.	Average number of committee members attending	7
	Total Management Committee hours per year	140

Multiplying the three items shows the Management Committee contributed 140 hours to formal meetings each year.

Corresponding numbers were obtained for each responding group, to give an annual hourly total for formal Management Committee meetings. These were then added to arrive at the total by country.

Similar information was obtained and calculations made for newsletter/publications committees, social committees, office staff activities and "any other" committees which U3As might have set up.

In many cases U3As do not operate with more than one formal committee. Instead, the majority of tasks such as finances, membership records, publicity, tutor liaison and so forth, are carried out by the management committee and/or individuals. To help quantify these activities respondents were asked to think about every administrative task carried out within their U3As, and to:

1. provide a brief description of each task;
2. estimate the number of person hours per week devoted to each task;
and
3. estimate the number of weeks per year devoted to the task.

This kind of information is of a more qualitative nature than that obtained by counting tutor teaching hours. Nevertheless most U3A groups provided a comprehensive breakdown of administrative tasks and appeared to have little difficulty in ascribing a considered estimate of time committed to each. Tables

29A and 29B summarise the administration tasks and volunteer hours committed to each task.

TABLE 29A: Administration hours Australian U3As

		Number of groups	Total hours administration
1.	Management Committee	122	26,507
2.	Social Committee	27	1,569
3.	Newsletter Committee	27	1,829
4.	Other Committees	49	6,640
5.	Staffing office	53	77,006
6.	Other administration tasks	108	90,435
7.	Total administration hours		192,514

TABLE 29B: Administration hours NZ U3As

		Number of groups	Total hours administration
1.	Management Committee	35	3,593
2.	Social Committee	3	192
3.	Newsletter Committee	8	240
4.	Other Committees	5	40
5.	Staffing office	2	354
6.	Other administration tasks	27	10,298
7.	Total administration hours		14,717

Total U3A volunteer hours were obtained for each country by adding the respective grand totals for teaching (Tables 28A and 28B) and administration (Tables 29A and 29B). Totals are summarised in Charts 4A and 4B.

CHART 4A: Total U3A voluntarism in Australia in 2008

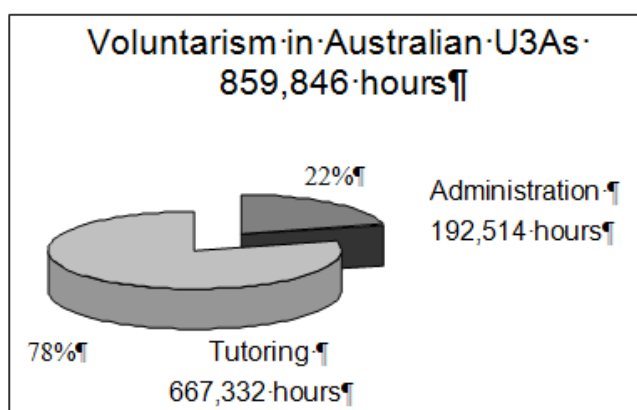
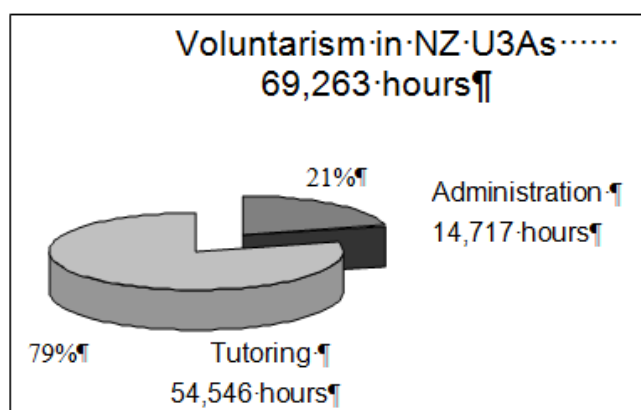


CHART 4B: Total U3A voluntarism in NZ in 2008



In some instances volunteers from outside the organisation provide specialist teaching and support. These outside contributions are both important and valued but they have not been counted in this analysis.

The financial value of U3A voluntarism

Tables 30A and 30B summarise the steps taken to attribute a dollar value to voluntarism within U3As in Australia and NZ.

TABLE 30A: The monetary value of voluntary activity in Australian U3As

1.	Total volunteer hours from survey (Chart 4A page 42)	859,846
2.	Membership of responding U3As (Table 2, row 4 page 9)	52,458
3.	Hours per member represented in survey (row 1 divided by row 2)	16.4
4.	2008 Total Australian membership (Table 2, row 2 page 9)	64,160
5.	Volunteer hours extrapolated to total 2008 Australian U3A membership (row 3 multiplied by row 4)	1,052,224
6.	Dollar value of Australian U3A voluntarism @ \$20 per hour	\$21,000,000

TABLE 30B: The monetary value of voluntary activity in NZ U3As

1.	Total volunteer hours from survey (Chart 4B page 43)	69,263
2.	Membership of responding U3As (Table 2, row 4 page 9)	7426
3.	Hours per member represented in survey (row 1 divided by row 2)	9.3
4.	2008 total NZ membership (Table 2, row 2 page 9)	10,154
5.	Volunteer hours extrapolated to total 2008 NZ U3A membership (row 3 multiplied by row 4)	94,432
6.	Dollar value of NZ U3A voluntarism @ \$20per hour	\$1,900,000

Calculations in Tables 30 and 30B were undertaken as follows.

- Step 1: Total volunteer hours as shown in Charts 4A and 4B
- Step 2: Total membership of all U3A groups represented in the survey as shown in Table 3
- Step 3: Hours of volunteer work per member of the responding U3As were calculated by dividing Step 1 hours by Step 2 members. For example, every U3A member of the Australian responding groups is supported by more than 16.4 hours of voluntary expertise
- Step 4: 2008 total U3A population of each country as shown in Table 3
- Step 5: Total voluntary hours extrapolated to the total membership of each country were obtained by multiplying Step 3 hours per member represented in the survey by the total U3A membership given in Step 4
- Step 6: The dollar value calculation of U3A voluntarism was obtained by multiplying Step 5 by a notional value of \$20 per hour.

Points of argument about these calculations are likely to focus on extrapolation of the data to the entire membership, and ascribing a notional value of \$20 per hour for U3A expertise.

More than 60% of U3As in each country responded to the survey, which is a good sample from which to infer population data. In addition, the actual membership represented within these responding U3As was 82% for Australia and 73% for NZ. It is unlikely that the non-responding groups would have revealed aberrations that would have substantially changed the general picture revealed in Table 30 calculations; therefore extrapolation to the total U3A population seems justifiable.

The final step of ascribing a notional value of \$20/hour for U3A expertise may surprise some. The amount of \$20 can be placed in perspective by comparing hourly rates from two different strata of the paid workforce. In 2008, the minimum hourly wage in Queensland was \$13.80. This means that no adult worker could legally be paid less than that amount regardless of how poorly educated or inexperienced. Given the high level of expertise within the U3A volunteer base a figure of \$20, or about 50% more than the minimum hourly wage rate seems reasonable. The other comparison is for a teacher in a non-governmental Queensland school with zero years of experience. The 2008 casual pay rate was a little over \$35/hour for a beginning teacher. Corresponding wages will differ somewhat in other States and New Zealand. However, the principle is clear. Compared with the cost for example of employing casual teachers to deliver equivalent services to those freely provided by U3A volunteers who have years of expertise to back their voluntarism, a notional figure of \$20 per hour as used in the above calculation is both reasonable and quite conservative.

The question remains. What is the point of ascribing a dollar value to U3A expertise?

Costs for all services are rising inexorably. The effect of price rises on retirees, and particularly pensioners with limited incomes who must meet basic costs like food, rent, utilities, and transport, is particularly serious. Many pensioners do not have the discretionary income to meet increasing costs for "life's little pleasures" and a real danger exists that some may have to curtail

or forego entirely participating in their successful ageing activities which make a hidden but significant contribution to their daily quality of life.

There is no magic pot of gold to address the problems faced by any sector of society as costs increase. Resource allocation difficulties will multiply as population ageing, climate change and other major societal imperatives place increasing pressure on governments to maximise benefits to wider society from relatively declining budgets. For the growing population of retirees, policies aimed at maximising their third age of independence and minimising time spent in the fourth age of dependency hold the greatest promise for the most advantageous allocation of resources. As discussed at the beginning of this report, belonging to groups or organisations which promote social interactivity, mental stimulation, exercise, and engagement with life are widely accepted strategies associated with successful ageing.

Although it seems self-evident that leisure groups for seniors (not only U3As) are making an important contribution to society, the onus in the future may be placed on these groups to argue the case for whatever support they may need to continue to provide for the most vulnerable of their members in an increasingly difficult fiscal environment.

For more than 20 years U3As in Australia and NZ have quietly provided many opportunities for members to take part in most or all of the successful ageing activities that are associated with continued independence in later life. The Successful ageing model was briefly introduced at the beginning of this report. Despite functioning for more than two decades the U3A concept remains poorly understood in the wider community.

The Foresight Project on Mental Capital and Wellbeing (Beddington et al, 2008) provides tacit endorsement of the U3A approach through its recommendation that “*as people move into older age, learning should be encouraged and actively promoted, as this can protect against cognitive decline*”. U3As are a bonanza for wider society. All high level services are provided by highly skilled retirees with little or no formal support provided by funding agencies. The peer education model which underpins U3A and similar organisations for retirees is both a socially and financially sensible way of harnessing the growing mental capital embodied in the retired population.

A 2008 value of \$21 million dollars for Australian U3A expertise and \$1.9 million dollars for NZ U3A expertise is a real attention grabber. The dollar amount, coupled with data from other parts of this report, provide clear evidence of the breadth, extent and value of U3A services in both financial and social terms. This information needs to be widely publicised to policy makers at the local, regional and national level by U3A leaders and where possible, through the media.

In addition to helping grow understanding about the relatively poorly understood U3A concept the data will provide a strong foundation for grant applications and requests for other forms of assistance to help U3As better meet the needs of their members.

Finally, some of the information should be adapted for U3A newsletters. Individual U3As can easily calculate the dollar value of U3A services to their

own members to help underscore to members they are getting a big bang for their membership buck in the following way.

For example, an Australian U3A with (say) 100 members would multiply membership by 16.4 (the average number of hours of U3A expertise backing every Australian member) and then multiply by \$20 getting \$32,000 as the notional annual value of their U3A services to members.

For NZ similar calculations apply, however the expertise multiplier is 9.3.

Additional findings

Tutors have been described as the “life blood” of the U3A movement and the significance of tutor contributions is illustrated in Charts 4A and 4B. In both countries tutors provide nearly 80% of total volunteer U3A hours. The provision of intellectually stimulating courses within a socially invigorating environment by the members rather than by paid experts is what makes U3A different from all other major learning organisations.

In Australian U3As in 2008 more than 222,000 hours of actual teaching were available to keep members’ minds active. During the 2008 NZ U3A teaching year more than 18,000 hours of actual teaching were available to keep members’ minds active.

Although U3A tutors are fundamental to the self-help U3A, model the key roles played by volunteers involved in the many administration tasks behind the scenes is a major consideration. As shown earlier in this report the large majority of U3A office bearers bring high level skills from their paid working lives to U3A management. Without high level leadership an all-volunteer organisation like U3A would almost certainly founder.

A notable difference in the ways Australian and NZ U3As operate is revealed in the time devoted to administration activities. For example, in Australian U3As 40% of the total administration hours (Table 29A, row 7) derive from activities associated with staffed offices (Table 29A, row 5). The NZ equivalent was 2%. Many large Australian U3A groups maintain offices that are staffed by teams of volunteers, often for twenty or more hours a week, for most of the calendar year. Office workers carry out many of the basic administrative details such as maintaining records, writing receipts, maintaining timetables, answering queries, welcoming newcomers and so forth. In many of the smaller U3As in NZ, individuals carry out most of these activities from their homes. As a consequence, other administrative tasks (Table 29, row 6) is high in the NZ table, representing 70% of the NZ total. The Australian equivalent is about 47%.

Earlier in this report lack of suitable accommodation was cited as the major problem faced by Australian U3As whereas this is of much less importance in NZ. The NZ approach, which emphasises small groups within a reasonably compact geographical region, could be argued as presenting fewer accommodation constraints than those experienced by large Australian groups. Australian groups that service a wide geographical range, and/or prefer large group sizes, need a central home base where volunteers, members and tutors can meet. This centralised approach appears to provide

more opportunities for volunteers to contribute and develop social networks during the course of their volunteer activities than an “administration from home” approach.

In the successful ageing preamble to this report volunteering was referred to as a well researched topic that benefits the volunteer as well as the wider community. Regardless of U3A size it would seem that the more opportunities that can be provided for members to volunteer their services in meaningful tasks, the better.

VI Possibilities for the future

Society is changing very rapidly. Organisations for retired people also need to change to meet the needs of new cohorts of retirees or run the risk of becoming defunct. Many once vibrant seniors' organisations became irrelevant because management seemed unaware of the need to avoid the tag of becoming "an old persons' club". Many retirees simply do not want to belong to a club that's firmly locked into a model of the past.

We have earlier commented on the high level of skills that U3A office bearers bring to their roles. Therefore, it seems likely that Committees of Management will be alert to the kinds of developments that may be needed to keep their U3As dynamic and progressive in the eyes of both current members and potential new members.

This section briefly outlines participants' reactions to 18 futures-oriented statements that may confront, or already be confronting U3A management. A number of these issues have been alluded to earlier in this report; others have been discussed at U3A conferences or are already a reality in some U3As.

Participants were asked to react to each of the 18 statements by ticking one of 5 options designated as strongly agree; agree; neutral; disagree; and, strongly disagree. Options were coded from 1 to 5; 1 = strongly agree to 5 = strongly disagree, and responses were totalled for each state/country and averaged. Responses are summarised in Table 31.

Average responses for each Australian State are listed separately. (The ACT and NT each had one U3A participating in this study so for convenience their responses have been clustered with those of a nearby State.) The listings by State in this study may act as a benchmark against which future studies can be compared. At this stage they have no particular significance. This is because most of the responses were provided by a single person who filled in the questionnaire rather than being the collective voice of an entire committee. In future research studies a more informative picture of collective regional thinking about future U3A trends will be possible if the move towards regional networks continues. Responses can then be sought from various *networks* rather than from individual leaders within the various U3As. Nevertheless, the listing in Table 31 provides a useful discussion point for assessing forward thinking among U3As about the future as it may affect the organisation.

The average for all responses by country is shown in the final two columns. Lower numbers that cluster around 1.5 to 2.5 indicate on average that respondents tend to agree with the statement; responses clustered around 3 are neutral; and higher numbers around 3.5 to 4.5 show that respondents tend to disagree with the statement. A number of "sacred cow" topics have been raised and it is interesting to note a general tendency to support change. For example, statement 3 leans towards a view that payment for some services would not destroy the self-help ethos. Statements 14, 15 and 18 show support for greater communication, cooperation and collaboration between U3As, an area that has been strongly opposed by some U3A leaders in the past. Bearing in mind that the responses come from individuals not from entire management committees, this support is encouraging news for those who advocate working to develop U3A networks.

TABLE 31: Possibilities for the future

"In the future ...	NSW & ACT (n=39)	Vic (n=48)	Qld (n=15)	Tas (n=5)	SA & NT (n=13)	WA (n=6)	Aus (n=126)	NZ (n=37)
1. Will be difficult attracting volunteer administrators	2.2	2.3	2.4	2.0	2.8	1.7	2.6	2.4
2. May need to pay an administrator	3.4	2.9	3.4	3.7	3.1	3.2	3.2	3.2
3. Payment would undermine self-help nature	2.2	2.6	1.8	1.7	2.3	2.0	2.3	2.3
4. U3As may play a wider role by helping in libraries, galleries etc that would benefit from expert volunteers.	3.2	3.0	3.6	4.3	3.6	2.3	3.2	3.1
5. Will carry out research relevant to the wider Third Age population	2.6	2.4	2.9	3.0	2.4	2.3	2.5	2.8
6. Will need to attract under represented groups	2.2	2.0	2.1	2.7	2.1	1.5	2.1	2.4
7. May pay outside experts to run some specialist courses	3.7	2.9	3.2	4.3	3.4	2.2	3.4	2.8
8. May need to pay for specialist teaching facilities	2.5	2.6	2.9	4.0	3.1	2.5	2.7	2.9
9. Governments should be asked to provide funding	2.7	1.5	3.3	3.3	2.4	2.8	2.3	3.2
10. Technical demands on the Third Age population will increase	1.8	1.6	1.5	2.0	1.6	1.5	1.7	1.7
11. Fewer retirees will join U3As	3.6	3.6	3.6	4.0	3.7	3.2	3.6	3.5
12. Future members interests will differ from those of today	2.5	2.5	2.7	3.0	2.7	1.7	2.5	2.7
13. Expectation that retirees will need to do more to support themselves	2.0	2.0	2.1	2.3	2.4	1.7	2.0	2.3
14. U3As will communicate with each other more and share resources	2.3	2.1	2.2	2.3	2.3	2.2	2.2	2.4
15. U3As will take part in wider educational activities e.g. educational travel, exchange visits etc.	2.5	2.2	2.8	2.7	2.8	2	2.4	2.6
16. Expectation that members will pay more for higher level of services	3.4	3.3	3.4	4	3.8	3	3.4	3.3
17. U3As will become involved in social justice projects like email mentoring of students in developing countries	3.3	3.1	3.9	3.3	3.3	3	3.3	3.6
18. A national communication network will assist local U3As to better meet needs of a changing society.	2.3	2.2	2.5	2.3	2.4	1.7	2.3	2.6

VII Concluding Comments

Constituency Research and U3A

This research study is an example of the kind of high level *constituency research* activity that U3As are capable of turning their hands to (Swindell, 1992). The fundamental strength of the “constituency research” approach is that it entails research “with” rather than research “on” older people. The difference between “with” and “on” may not matter too much in large scale, tick-a-box surveys. However, if much richer findings are needed, these are more likely to arise from interviews carried out by peers who are perceived to have primary empathy with the participants rather than by younger researchers whose appearance, manner of dress, language, general persona, time constraints and possibly levels of commitment to the research, may create barriers to in-depth communication.

U3A is an organisation which seems tailor-made for a leadership role in constituency research. U3As are all about learning and there are few if any learning opportunities which can surpass discovering new knowledge or achieving novel outcomes through applied research. Although U3As are open to all older people, they tend to attract many with higher-than-average educational qualifications and/or those who held leadership positions in their former working lives. These are the people who could become interested in forming an international network of U3A researchers who carry out and publish research studies which could benefit not only the U3A movement but also the wider ageing population, nationally and internationally.

In this study the Internet facilitated rapid and very low cost collaboration between members of the eight-member Project Management Group, and with participating U3As. Without the Internet, communication about all stages of the study would have been much less effective and very much more expensive. The Internet has opened up a low cost medium for research collaboration by U3As everywhere. Low cost, high impact, constituency research projects carried out by U3A researchers from many countries have the potential to unearth many novel findings which are beyond the reach of conventional research teams and methodologies because of constraints such as time, cost and access.

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IX Other reading

Drafts of a number of published studies and articles directly related to U3A can be read or downloaded from the U3A Online website.

1. Go to *www.u3aonline.org.au*
2. Click the top left drop down menu item labelled *U3A Online*
3. Click *Research/Reports*
4. Scroll down to read report titles
5. Click *Download Report*

Rowe, J. & Kahn, R. (1999). *Successful Aging*. New York: Random House.

Recommended reading for those who would like to know more about the many research findings to emerge from the largest study of ageing undertaken in the USA. The 250 page book is written in a very accessible style. It may be available from your library (note the American spelling of aging). If not try Amazon.com. where you'll probably find second hand copies for around US\$5-10.

Appendix

- **Recruitment:** U3As may be able to use some of the following methods for their own recruiting purposes (see p. 20).

Appendix Table 1: Active recruitment of members

advertising	networking
articles in newspaper	newsletter
attending seminars	open days
brochures in local venues	outreach to residents associations
citizens advice bureau	pre-existing groups invited under U3A umbrella
community college newsletter	profile at cultural centre
council directory	public forums
displays	radio
information to employers for inclusion in retirement packs	seniors' festival
interesting courses	seniors' forums
involvement with aged care facilities	talks by members
letterbox drop	website
mail outs	word of mouth

- **Government assistance:** The following two tables list ways that U3As would use government funding.

Appendix Table 2A: How Australian U3As would use government assistance if it were available (see main ways - page 26)

community health-lifestyle support	lounge/common room
costs - telephone, printing, electricity,	marketing services
disabled access	pay for building repairs
email access for members	professional help with funding applications
employ co-ordinator	public liability insurance
hire consultant	reference and course material
in house training sessions	seniors "drop-in centre"
internet,	storage -equip, files etc
employ gardener/cleaner	tutor training
keep fees affordable	update computer programmes

Appendix Table 2B: How NZ U3As would use government assistance if it were available (see main ways - page 26)

comprehensive course listings
course booklet/material,
fostering enthusiasm
improve communications
ready-made lectures
transportation costs

- **Achievements:** Participants were asked what they would like to achieve in the next five years. The following two tables list desired outcomes.

Appendix Table 3A: Desired accomplishments within the next 5 years – Australian U3As (see page 28)

attract tutors/leaders
develop more subcommittees
government funds without control
improve quality
keep costs/fees low
link with other U3As
more cultural diversity
more male members
more member involvement/volunteerism
stable management
stronger links with a university
wider publicity

Appendix Table 3B: Desired accomplishments within the next 5 years – NZ U3As (see page 28)

attract tutors/leaders
attract younger members
enhanced use of technology
Improve quality
keep costs/fees low
maintain or add membership
more cultural diversity
more male members
more member involvement/volunteerism
stable management
wider publicity

- **Most sought-after courses:** The following tables list the five most sought-after courses identified by all U3As in the survey. This gives some indication of the richness and variety of available courses provided by volunteer tutors.

**Appendix Table 4A: Five most sought-after courses in Australian U3As
(see page 33)**

academic	adobe photoshop	advanced computer courses
armchair travel	art appreciation	bird watching
asian studies	astronomy	choir
book Groups	calligraphy	cooking courses
Christianity	curio corner	current affairs
creative writing	debating	digital photography
dancing	discussion groups	enquiring minds
discussion group	environment	excursions
environment	feldenkrais	film
four week classes - any topic	furniture restoration	gardens
genealogy	gourmet club	guest Speakers
hand chimes	health	introduction to cities
Humanities	internet	learning challenge
investment	meditation	local places of interest
lecture series	science and humanities talks	mobile phone course
lunch around the world	shibashi	music performance
moveable feast	small group interests	psychology
philosophy	sociology	senior adventures
science	swimming	short courses
services - ambulance, fire etc	the islamic city	social work
singing	U3A online courses	supper club
social/dinner club	yoga	table games
sustainable development	theatre visits	Tai chi
walking	thoughts & ideas	wine appreciation

**Appendix Table 4B: Five most sought-after courses in NZ U3As
(see page 33)**

antiques & collectables	architecture	art appreciation
arts & crafts	BBC open university "coast"	biographies
civilisations	computing	creative writing
dairy industry	digital photography	drama
ethnic food	every picture tells a story	excursions
famous and infamous	film	film discussion
gallery visits	gardens	guest Speakers
humanities	investment	languages
law & order	lecture series	literature
local knowledge	lunch discussion	medical matters
opera	philosophy	play reading
politics	red hat club	religion
shows	stage and screen	stimulating lectures
table games	Tai Chi	theatre
weekly full membership courses		