

The role of the University of the Third Age in meeting needs of adult learners in Victoria, Australia

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Many older adults are interested in learning long past the age dictated by social norms. Some want to learn simply for the joy of learning, others because of the social contacts made by joining a community of learners, and still others want to learn so that they have a purpose in life. The University of the Third Age (U3A) is one of several models for lifelong education after retirement which have been developed worldwide. This article reports on a survey which explored the experiences of U3A members of two selected U3As in Victoria, Australia. The findings indicated that respondents were satisfied with their U3A experiences which had contributed in various areas of their lives leading to personal, mental, social and physical enhancement. It emerged that U3A is an important means of enhancing the quality of life for older adults through the provision of lifelong education.

Introduction

Older adults comprise the fastest growing sector of the population in most developed countries and yet governments have been slow in recognising the need to provide educational opportunities for the elderly. Almost four decades ago, the Fauré Report, *Learning to Be* in (UNESCO 1972, cited in Jarvis & Griffin 2003:330) advocated lifelong learning for all. Although the slogan of learning for all has been frequently used by governments in electioneering, few countries include older people in their national policies for lifelong learning (Withnall 2000, Jarvis 2002). Lifelong learning continues to be viewed narrowly, as training for work and training in work, directed primarily at young and middle-aged people (NIACE 2000). Notwithstanding, in industrialised countries increased longevity and a burgeoning population over the age of 60 years has made aging a political and economic concern. People are retiring earlier and are demonstrating an interest in continuing, or returning to, learning designed for non-vocational purposes, self-fulfilment and the pursuit of leisure. Such learning has proven to provide multiple benefits for older adults: mental and physical improvement, increased confidence and self-esteem, and increased social contacts and relationships (Aldridge & Lavender 2000, Antonucci & Akiyama 1991, Swindell 1999, Andrews, Clark & Luszcz 2002, Dench & Regan 2000).

In light of the willingness of older adults to participate in education and the benefits provided, it is important to consider what kind of educational models best serve their interests and goals. A number of educational models have been specifically designed to meet the needs of older adults. The Elderhostel movement in the United States provides significant travel opportunities combined with education. Learning opportunities are usually provided through week-long, low-cost, non-credit courses by academics on academic campuses (Stephan, Leidheiser & Ansello 2004, Baires 1996).

The Institutes for Learning in Retirement (ILR), also US-based, are independent organisations affiliated with a college or university and offer college-level courses with members participating in all aspects of curriculum design, instruction and administration (Nordstrom 2002, Manheimer, Snodgrass & Moskow-McKenzie 1995). Another well-known model is the University of the Third Age (U3A). The term 'university' is used in the medieval sense of fellow students joined together in the selfless pursuit of knowledge and truth for its own sake (Midwinter 1984). The concept of the 'third age' relates to Laslett's description of the four ages in a lifespan, which are defined neither chronologically nor biologically. Retirement from the workforce and the freedom from many domestic responsibilities to pursue personal goals and interests is characteristic of the period known as the third age (Williamson 2000). The first University of the Third Age, *L'Université du Troisième Age*, was developed in Toulouse, France in 1972 to improve the quality of life for older adults (Glendenning 2001). According to the French model, university faculty on traditional campuses conduct courses for 'third age' students (Vellas 2003). Many U3As in Europe, or Universities for Seniors, follow the French model, and are linked to and administered by universities. The courses, usually seminars and open discussion sessions, are mainly teacher-directed. University committees draw up curricula and university faculty conduct the teaching. The fees, programs and the hours learners can attend per annum vary greatly. The courses offered are 'based on the assumed needs and interests of older persons' (Formosa 2000:323).

In 1981 the British version of the U3A was established in Cambridge. This model is based on 'self-help' and 'self-sufficiency' (Laslett 1996:228) and is not usually affiliated with traditional education institutions. It is 'open' in the sense that there are neither academic admission requirements nor examinations. A key principle (Laslett 1996:228) is that: 'The university shall consist of a body of

persons who undertake to learn and help others to learn. Those who teach shall also learn and those who learn shall also teach.' There are similarities between the British U3A and the ILR: both programs reflect an egalitarian, self-help philosophy. Peer teaching and the self-help philosophy combine to make a rare and provocative model of education (Brady, Holt & Welt 2003, Midwinter 2003, Manheimer 2002). The British U3A model, now in existence for over 25 years, continues to be based on self-help and the control of the U3A is in the hands of its members (Midwinter 2003). The British U3A model has been adopted and is operative in Australia, New Zealand and South Africa.

The first U3A in Australia was developed in Melbourne in 1984 (U3A Network Victoria 2004). The U3A movement firstly spread rapidly through Victoria, and later throughout the whole country. According to McDonnell (1995:3), 'U3As have become Australia's fastest growing educational movement'. The administration of U3A in Australia is based on volunteers for management, teaching and office positions with minimal operational costs (Swindell 1999). The peer teaching aspect allows members to take an active part in teaching on a voluntary basis with no costs involved. The range of courses offered is extensive and classes are conducted throughout the year. The low cost of membership is one of the most positive aspects of U3A. There are no course fees, only an annual membership fee of around \$A20 to 30 per annum. This makes U3A membership affordable for all, as most retirees have a limited income (Dale 2001).

The aim of this paper is to discuss the contribution of U3A to lifelong learning for older adults with specific reference to its functioning in Victoria, Australia. A survey of members of two selected U3As in Victoria explored the participation in and experience of U3A learners with regard to the lifelong learning needs of older adults.

Research design

Currently, the state of Victoria has 64 U3As with about 17,258 members (U3A Network Victoria 2004). This study investigated the role of U3A in Victoria. Data were gathered by means of a postal survey distributed to enrolled members of two selected U3As. A questionnaire comprising 18 questions was distributed by mail to 987 members of the two selected U3As – the return rate was 63.5% (N = 627). The two participating U3As chosen as the sample were considered representative of the broader target population comprising all U3As in Victoria. Both U3As have mixed gender membership and have been in existence for nearly 15 years. The first six items dealt with demographic data of respondents (identity was not requested); questions were structured but room for individual open-ended comment was included so that respondents could express their views freely on certain issues. The questionnaire was pilot tested and appropriate adjustments made. The questionnaire was mailed together with a covering letter explaining the purpose of the research. The data collected were analysed using the Statistical Package for the Social Sciences (SPSS). Frequency tables and other descriptive analyses and charts were produced to obtain an overall picture of the data collected.

Findings

The findings of the survey indicated the following:

Demographic profile of respondents

The mean age for male respondents was 73.3 years and for females 70.3 years. The largest group of members (44.3%) was in the 70–79 age category. The second largest group (36%) was in the 60–69 category and 14% of respondents were over 80 years. Hurworth and Rutter's (2001) study of U3A in Victoria produced similar findings regarding age. With regard to marital status, just

over half the respondents (57%) were married. With regard to level of education, 29.7% of the respondents had completed high school at the highest level of education, 23.4 % had completed an undergraduate university degree, 29.8 % had completed business/technical or trade certificates or undergraduate diplomas, and 11.2 % held postgraduate degrees. With regard to occupation prior to retirement, 45.3% indicated that they were in professional occupations, 25% indicated secretarial/office work, and 14% indicated management positions.

Preference for instructional settings

Table 1 indicates the respondents' preferences for instructional settings.

Table 1: Preference for instructional settings

	Frequency	Valid percent
Traditional classroom settings	172	27.7
Small informal groups	227	36.6
In private homes	3	0.5
It does not matter	219	35.3
Missing	6	-
Total	627	100

Little preference was expressed by respondents regarding the type of settings for instruction. 'Small informal groups' scored slightly higher (36.6%) than the category 'It does not matter' (35.3%). The 'traditional classroom' setting was slightly less popular (27.7%). A negligible 0.5% preferred private homes as the setting for instruction. U3A members' preference for classroom settings has been cited as important to levels of participation. Findsen (2001) found that formal classroom settings could constitute an institutional barrier to participation.

Reasons for joining U3A

Table 2 indicates the reasons for joining U3A.

Table 2: Reasons for joining U3A

	Frequency	Valid percent
Curiosity	12	1.9
To gain knowledge	438	70.2
Personal satisfaction	107	17.1
To mix with stimulating people	54	8.7
To escape daily routine	5	0.8
To make new friends	8	1.3
Missing	3	-
Total	627	100

The findings indicate that most respondents (70.2%) joined U3A ‘to gain knowledge’. Only 17.1% indicated that they had joined ‘for personal satisfaction’, while 8.7% joined U3A to ‘mix with stimulating people’.

Reasons for not joining U3A earlier are documented in Table 3.

Table 3: Reasons for not joining U3A earlier

	Frequency	Valid percent
Not aware of existence of U3A	250	31.8
Thought I was too old to learn	102	13.0
Negative experiences from previous educational circumstances	68	8.6
Term ‘university’ put me off	61	7.8
Lecture venue/environment not convenient	73	9.3
Other	233	29.6
Missing cases	66	-
Total responses	787	100

The largest group of respondents (31.8%) had not joined earlier as they had been unaware of U3A; 13% of the respondents had been reluctant to join as they had felt they were too old to learn. Negative perceptions about the learning environment (9.3%) and prior negative educational experiences (8.6%) had kept others from joining earlier. Almost a third (29.6%) of the respondents indicated 'other', citing reasons such as fulltime work, age, inadequate information and care-giving responsibilities in the space left for open ended responses. Peterson and Masunaga (1998) maintain that lack of awareness is one of the main obstacles preventing people from continuing with lifelong learning. The feeling that one is too old to learn is also a stereotype widely persisting in society (Lamdin & Fugate 1997).

Participation of respondents in TAFE or university courses

The question whether respondents had enrolled during the past five years in any TAFE or university courses was posed. Only eight percent of the respondents had enrolled in such courses during the past five years. Further, the majority of respondents who answered negatively to this question were asked to give a reason. Most respondents gave lack of interest as a reason. Another reason mentioned was the cost of TAFE and university courses in contrast to U3A courses which cost very little.

Enhanced quality of life due to participation

Respondents were asked to evaluate the benefits of U3A on a five-point scale in which 1 indicated 'not at all' and 5 'to a great extent'. The great majority (96%) of the respondents indicated that they had benefited from participation in U3A in some way.

Furthermore, respondents were asked to identify which aspects of their life had improved due to participation in U3A. Eight possible responses were given: social inclusion, intellectual development, self-esteem, independence, ability to find employment, memory,

health, ability to keep up with technical changes, and other. The responses are presented separately in Tables 4 to 10.

Table 4 indicates the findings dealing with social inclusion.

Table 4: Increased social inclusion

	Frequency	Valid percent
Not at all	24	4.4
Little extent	29	5.3
Some extent	208	37.9
More extent	178	32.4
Great extent	110	20.0
Missing	78	-
Total	627	100

Most respondents (90%) indicated that participation in U3A had contributed to social inclusion in some way. Twenty percent indicated that participation had contributed to a ‘great extent’. The importance of social inclusion in older adults has been well documented (Pinquart 2002, Antonucci & Akiyama 1991, Swindell 1999).

Findings regarding increased intellectual development are displayed in Table 5.

Table 5: Increased intellectual development

	Frequency	Valid percent
Not at all	6	1.1
Little extent	15	2.7
Some extent	217	38.5
More extent	235	41.7
Great extent	90	16.0
Missing	63	-
Total	627	100

Most respondents (96%) indicated that participation had increased their intellectual development. This is a positive result, as the main reason for most respondents joining U3A – as indicated in Table 2 – was ‘to gain knowledge’.

The findings for self-esteem are indicated in Table 6.

Table 6: Increased self-esteem

	Frequency	Valid percent
Not at all	35	7.2
Little extent	38	7.8
Some extent	198	40.6
More extent	133	27.2
Great extent	84	17.2
Missing	139	-
Total	627	100

Most respondents (85%) indicated that participation in U3A had increased their self-esteem. Pinquart (2002) found that social relationships contribute to older adults’ sense of self, and are important for self-esteem, well-being, and good mental and physical health. Blau (in Hall-Elston & Mullins 1999) also found that peer friendships in later life were critical to positive self-image, confidence and self-esteem.

With regard to increased independence, the findings are indicated in Table 7.

Table 7: Increased feelings of independence

	Frequency	Valid percent
Not at all	85	20.7
Little extent	64	15.6
Some extent	116	28.3
More extent	93	22.7
Great extent	52	12.7
Missing	217	-
Total	627	100

The response, ‘some extent’, was indicated by 28.3%, while the second highest score was for ‘more extent’, with 22.7%. A total of 12.7% indicated ‘great extent’ (‘not at all’ had a response rate of 20.7%). In studies of older adults engaged in educational activities, independence has invariably been associated with older adults’ perceptions that they had control over their lives and feel a sense of freedom (Searle, Mahon, Iso-Ahola, Solrolias & Van Dyck 1995:107, Kolland 1993:535).

Findings on whether participation increased their ability to find employment are indicated in Table 8. Only 11 males and 43 females out of the total sample answered this question. Of these, 74.1% indicated ‘not at all’, and 14.8% indicated ‘little extent’. This in line with the aims of U3A which does not attempt to provide training for employment.

The response on whether participation improved memory is indicated in Table 8.

Table 8: Participation improved memory

	Frequency	Valid percent
Not at all	34	6.2
Little extent	32	5.8
Some extent	223	40.5
More extent	212	38.5
Great extent	49	8.9
Missing	77	-
Total	627	100

The majority of respondents felt that participation improved memory. The categories ‘some extent’ to ‘great extent’ were indicated by 88% of the respondents.

The response on whether participation improved health is shown in Table 9.

Table 9: Participation improved health

	Frequency	Valid percent
Not at all	72	14.1
Little extent	68	13.3
Some extent	204	39.8
More extent	112	21.9
Great extent	56	10.9
Missing	115	-
Total	627	100

Three quarters of the respondents believed that participation improved health. The categories ‘some extent’ (39.8%) and ‘more extent’ (21.9%) showed the highest scores. A number of studies corroborate this finding that learning and well-being among

the elderly are positively correlated (Pinquart 2002, MacNeil & Teague 1987).

Findings regarding the increased ability to keep up with technical change are found in Table 10.

Table 10: Participation increased ability to keep up with technical change

	Frequency	Valid percent
Not at all	143	31.2
Little extent	76	16.6
Some extent	126	27.5
More extent	84	18.3
Great extent	30	6.5
Missing	168	-
Total	627	100

Of the respondents who answered this question, 31.2% indicated 'not at all' and 27.5% indicated to 'some extent'. There was a marked difference in the age category analysis of the question. The lower age groups, <60 (48.3%) and 60–69 (40.9%), indicated 'not at all', while 'some extent' scores were higher in the 70–79 (30.3%) and 80+ (47.2%) categories. The category 'more extent' was rated highest in the 70–79 group of respondents, with 22.9%.

Areas for improvement in U3A

Respondents were asked to indicate areas for improvement in U3A. Rank 1 indicated most important and Rank 2 indicated second in importance. The most important areas where U3A could be improved are presented in Table 11.

Table 11: Areas where U3A could be improved (Rank 1)

	Frequency	Valid percent
Types of course offered	145	38.8
Quality of tutors	61	16.3
Classroom availability	111	29.7
Times and scheduling of courses	54	14.4
Other	3	0.8
Missing	253	40.4
Total	627	100

The category with the highest response was improvements in ‘types of courses offered’ (38.8%), followed by ‘classroom availability’ (29.7%). ‘Quality of tutors’ (16.3%) and ‘scheduling of courses’ (14.4%) were deemed of similar importance.

Table 12: Areas where U3A could be improved (Rank 2)

	Frequency	Valid percent
Types of course offered	64	26.8
Quality of tutors	45	18.8
Classroom availability	64	26.8
Times and scheduling of courses	62	25.9
Other	4	1.7
Missing	388	-
Total	627	100

Table 12 (Rank 2) also shows the highest proportions in the same categories, ‘types of courses offered’ (26.8%) and ‘classroom availability’ (26.8%). Together, these results indicate that types of courses offered and classroom availability are the main areas where members feel that improvement should occur. The reason why ‘types of courses offered’ is indicated as an area for improvement may be attributed to a lack of availability of tutors in certain subject areas.

Service as tutor or in U3A management

As mentioned, U3A is a self-help organisation as far as teaching and administration are concerned. However, only 15.1% of the respondents indicated that they had served as tutors at U3A. An analysis of educational background of tutors indicated that they are more likely to have an undergraduate or postgraduate degree than those who have not. Of those who served as tutors, 37.2% had an undergraduate degree and 17% had a postgraduate degree. The self-help philosophy of the U3A also includes members performing all administrative tasks. However, in this regard, only 8.2% of the respondents had served on a U3A management committee.

Responses to open-ended questions

The questionnaire allowed for open-ended comments. Respondents appreciated their teaching experiences as tutors at U3A. One respondent mentioned: 'I have been using my teaching experience at U3A which has given me great satisfaction'. Another respondent, with no previous teaching experience, commented: 'I discovered that I had a flair for teaching not thought of before. It has given me great pleasure to impart knowledge and see results'. Other members maintained that they benefited from participation on the management committee of U3A or helping with work in the office. Others mentioned the peer teaching aspect of U3A – being *both* a teacher *and* a student. This is in line with Gaskell's (1999:268) remark: 'Teachers and students are peers in the democratic University of the Third Age model'. Furthermore, respondents appreciated the affordability of U3A – class participation without undue competition and stress, and the kindness of fellow members *in general*. Frequently, respondents mentioned the advantage of relating to people of their own age group. Respondents also remarked that U3A gave structure to daily living. A respondent stated: 'Monday morning class "gets me going" for the week'. Similarly, Johnson (1995) found that older students enrolled in the UK's Open University

appreciated the structure it gave to retirement. An unexpected benefit for respondents was greater awareness of the multicultural society as they had engaged with members from other ethnic groups and backgrounds. Interestingly, women respondents mentioned that U3A gave them the opportunity to compensate for educational opportunities missed during youth or while raising children. Unlike men, women also mentioned a sense of power, a sense of achievement and confidence, as a benefit of U3A.

Conclusion

The U3A, especially the British model, is increasingly popular in a number of countries and is well established in Australia. This study explored the experience of respondents in U3A with regard to the lifelong education needs of a sample of older adults in Victoria, Australia. The U3A concept appealed to the respondents with its emphasis on peer-teaching philosophy, community orientation, accessibility, affordability, and the wide variety of courses offered throughout the year giving enjoyment and structure to members' lives. The results of the study showed that participants were very satisfied with their membership of U3A, that learning activities made substantial differences to their lives and that the benefits of participating in U3A activities were numerous.

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