

## **U3As in Australia and New Zealand: Society's four million-dollar bonanza**

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## Abstract

The self-help model of the University of the Third Age (U3A) has developed strongly since its comparatively recent introduction to Australia and New Zealand. This paper reports on findings from a survey of 84 U3A groups in Australia and 14 U3A groups in NZ. The survey had three discrete aims. The first was to demonstrate a method for explicating the nature and extent of the voluntary activities underpinning the self-help approach, and to ascribe a dollar value to these activities. Conservative calculations show that the annual value of voluntarism in Australian U3As is in excess of \$4,000,000 and, in NZ U3As, in excess of \$300,000. A second aim was to reveal regional similarities and differences in approaches, as well as to highlight the educational characteristics of the very successful self-help model of adult education. The third aim of the study was to gain a measure of U3A administrators' preparedness to respond to possible social change, by analysing responses to 18 futures-oriented questions. Findings show that U3A administrators have a vision that extends well beyond the immediate confines of their own groups and are prepared to consider the introduction of research projects, communications involving new technology, and activities that involve their groups in interactions with the wider ageing community.

The latter half of this century has been a period of historically unprecedented social and economic change, which has transformed the way that many older people think about themselves and their roles in society. Changes in family size and composition, gender roles, life-style expectations, education levels, employment mobility and better health are leading to an older population that McCallum and Geiselhart (1996) regard as being more demanding and powerful than ever before. The new breed of ageing retirees sees the Third Age as a time for personal productivity and fulfilment. Many pursue goals in retirement that few of their parents could have aspired to, let alone achieved (Laslett, 1989). With higher average education levels than those of preceding ageing cohorts, and almost unlimited access to information via the Internet and other readily accessible sources, older people are better placed than they have ever been to maximise their independence and opportunities for personal growth.

Many people in society have a negative view about the capabilities of the ageing population despite ample evidence from everyday life that the stereotypes they maintain are wrong. By and large the ageing tend to be seen as a passive, needy and dependent group who are takers and recipients of pensions and welfare services funded by a declining proportion of people in the workforce. Rarely are they thought of as givers and helpers despite the fact that many older volunteers contribute significantly to health, welfare and education systems, as well as to community and social institutions (Jones 1992; Nicholls 1996).

The wide-spread nature of voluntarism by retired people and its value to society was highlighted in the 1996 United Nations Nongovernmental Organizations symposium entitled *Living Longer Living Better*. One of the recommendations arising from the symposium was that voluntarism should be:

...developed as a worldwide concept, thereby providing a structure for older persons to contribute acquired lifelong experience to others. The value of volunteer work should be measured and included as part of the national economy (*Living longer...living better* 1997: 5).

The idea of measuring the value of voluntarism is a particularly appealing one. Sheppard, Myles and Polivka (1996) have attacked proponents of what they call apocalyptic gerontology and their tendency to blame the ageing for shortfalls in social services budgets. However, without firm data with which to rebut socially damaging generalisations, the ageing population will continue to serve as a convenient scapegoat for those seeking superficial explanations for complex social problems. In today's cost-benefit focused times a strategy that would cause many second agers to take note of the significant contributions that retired people make to society would be to calculate and publicise the monetary value of their contributions. Instead of modestly letting the record of voluntarism speak for itself (which, patently it is not doing) an actual dollar figure should be ascribed to the work done by Third Age volunteers. This figure should become part of national productivity calculations.

This paper reports on a study of the University of the Third Age (U3A) in Australia and New Zealand. The study had three principal aims. The first of these was to demonstrate a method for quantifying the work provided by U3A volunteers and ascribing a monetary value to that work. Although the study is specific to U3As in Australia and NZ the process is probably appropriate for other organisations that rely on the assistance of volunteers. The second aim was to explicate developments within U3As in both countries and to reveal regional similarities and differences as well as highlighting the educational characteristics of the indisputably successful self-help

U3A model of adult education. Data of this nature are likely to be of assistance, particularly to adult education theorists, because they serve as a benchmark against which future developments can be compared. The third aim of the study was to gain a measure of U3A administrators' preparedness to respond to possible social change, by analysing responses to a number of futures-oriented questions. These responses are likely to be of interest both to U3A practitioners who might want to consider U3As in the context of a wider society, and to policy makers considering alternatives and options for our rapidly greying societies.

### **Method**

A draft three-part questionnaire addressing voluntarism, teaching and administration, and visions for U3As' future was pilot tested by 14 U3A administrators and adult educators from Australia, NZ, the UK and the USA. The final version of the questionnaire incorporated additions and amendments suggested by the pilot group and allowed for a variety of structured and semi-structured responses. Estimated completion time was 50-60 minutes. The questionnaire was sent to administrators of every U3A group in Australia (N=120) and NZ (N=20).

Part 1 of the questionnaire centred on all aspects of voluntarism within U3As. The purpose of this section was to quantify all the teaching and administrative hours carried out by U3A groups in Australia and NZ, and to use this information to calculate a monetary value for this work. Participants were asked to complete a form detailing the duration of the teaching year and the number of hours of teaching in an average week. During analysis these numbers were multiplied to give an annual teaching hours total for each group, then summed by country to give a grand total for teaching. A similar process was followed for administration tasks.

Part 2 comprised a selection of closed and open questions, which addressed demographic, administrative, education and background characteristics of U3A groups.

Part 3 consisted of 18 futures-oriented statements addressing possible new opportunities or emerging difficulties that U3A administrators of the future may have to consider. Participants were asked to respond to each statement by circling one of 5 Likert type responses ranging from strongly agree through to strongly disagree.

### **Findings**

Eighty-four Australian groups (67%) and 14 New Zealand groups (70%) replied. These response rates were sufficiently high that no follow-up mailing was required.

#### **The value of U3A voluntarism**

Table 1 outlines the steps involved in the calculation of a monetary value for the main voluntary activities that underpin the operations of U3As in Australia and NZ.

**Table 1. Sequence of steps involved in the calculation of a monetary value for U3A voluntarism**

<b>Key steps</b>	Australia	NZ
1. Total annual teaching hours <sup>a</sup>	213,734	20,158
2. Total annual administration hours	130,478	6,626
3. Total annual volunteer hours	344,212	26,784
4. Membership of groups responding to the survey <sup>b</sup>	24,870	2002
5. Hours volunteered per represented member	13.8	13.4
6. Total membership	32,757	2,601
7. Volunteer hours extrapolated to total membership	425,841	33,813
8. Dollar value of U3A voluntarism @ \$10/h	\$4,250,000	\$338,000

<sup>a</sup> Includes an estimate of one hour preparation for each teaching hour

<sup>b</sup> General members were not surveyed.

Step 1. Person hours devoted to U3A teaching throughout 1996 have been totalled for the 84 responding groups from Australia, and the 14 responding groups from NZ. The totals include an estimate of one hour of preparation for every hour of face-to-face teaching.

Step 2. Person hours devoted to all U3A administration tasks throughout 1996 have been totalled for the 84 responding groups from Australia, and the 14 responding groups from NZ.

Step 3. Steps 1 and 2 were added to give total volunteer hours for each country.

Step 4. The membership of all the U3A groups that responded to the survey is shown. (Note: Individual members were not surveyed.)

Step 5. Hours volunteered per represented member were calculated by dividing step 3 hours by step 4 membership. This shows that every member belonging to the responding groups is supported by more than 13 hours of voluntary expertise.

Step 6. Total membership numbers were obtained from data recorded in the annual U3A Directory for Australia and New Zealand.

Step 7. Volunteer hours extrapolated to total membership were calculated by multiplying the step 6 population by step 5 hours (rounded down to 13 hours per member).

Step 8. The total dollar value estimate for U3A voluntarism was obtained by multiplying step 7 hours by a notional value of \$10 per hour.

## **Discussion**

U3A voluntarism is calculated to be worth more than 4 million dollars annually to the Australian community and more than \$300,000 to the New Zealand community.

The most notable characteristic of the self-help U3A movement is its reliance on member tutors for all course preparation and delivery. Of the many voluntary activities undertaken in any U3A group the calculation of actual teaching hours is likely to be the easiest and the most accurate to determine. Each U3A regularly advertises courses to members and this written record allows a relatively straightforward calculation of annual teaching hours to be made. The tutors prepare their own courses and tailor these to the specific interests of their groups. However, teaching is not merely a matter of delivering the advertised content. Each session requires considerable preparation time, in fact some tutors report spending 4 or more hours of preparation for every hour of face-to-face teaching. In recognition of this "hidden" but essential component of teaching productivity Step 1 total teaching hours include a conservative estimate of one hour preparation for every hour of actual teaching. Thus, the Step 1 teaching hours, as actually reported, are half the listed totals in Table 1, namely 106,867 for Australia, and 10,079 for NZ.

The total administration hours listed in Step 2 is open to greater subjectivity and uncertainty than that of teaching hours because this information is not routinely available. To assist and guide participants in their calculations of hours spent on the many and varied administration tasks that are needed to keep U3A groups operating effectively, the questionnaire contained a number of forms devoted to specific management tasks. As an example, to count management committee hours, each responding U3A was requested to list on the management committee form the number of meetings per year, the average hourly duration of meetings, and the average number of committee members attending. During analysis these numbers were multiplied to provide a figure for annual person hours devoted to management committee meetings. This group total was then added to similar calculations for every group to provide a grand total estimate of person hours devoted specifically to management committee meetings. Similar forms were provided for a number of other administration tasks known to be common to most U3As. In addition to completing these forms participants were asked to identify other administration tasks that had not already been counted. They were also asked to provide a brief description of every task identified in this category, and to estimate person hours per week devoted to each task, as well as estimating the number of weeks per year involved. During analysis, the descriptions of the administration tasks acted as a check against the possibility of multiple counting of hours.

The notional value of \$10 per hour, assigned in Step 8 to arrive at a value for U3A voluntarism of more than \$4 million dollars annually is conservative, given the high qualifications and/or life experience of U3A tutors and administrators. For comparison, the 1998 hourly wage for a young unskilled worker at an Australian McDonald's restaurant was \$10.85. Most U3A teachers and administrators come from professional and other highly skilled Second Age backgrounds and they bring with them an impressive range of life experiences. Thus, any argument about what might be a reasonable dollar value to assign to U3A voluntarism is likely to centre on how much greater than \$10 would be a reasonable notional value. If paid professionals were to provide equivalent services, the cost would be closer to three times this notional figure.

In the process of analysing voluntarism a marked difference was found in the ratios of teaching and administration hours between U3As in Australia and NZ. A much greater proportion of total volunteer time is devoted to administration in Australian U3As (38%) than in NZ U3As (25%). Much of this difference can be explained by an Australian tolerance of larger U3A groups than is preferred in NZ. A number of Australian groups have memberships above 1000. Many also have centralised operations that cover a wide geographical area and they have no constraints on membership size. In contrast many NZ groups have a stated membership ceiling of about 200, and members tend to be drawn from a well defined, compact region. As membership numbers approach 200 another group is encouraged to form. Because of their large size and delocalised operations many Australian U3A groups operate central offices that are staffed by teams of volunteers, often for fifteen or more hours a week, for most of the calendar year. There, teams of office workers carry out many of the key administration tasks such as updating membership records, writing receipts, maintaining timetables, answering queries and so forth. In contrast, few NZ U3As maintain central offices, and individuals carry out most administration activities from their homes.

The smaller membership and more compact regional groupings in NZ U3As may also have a tendency to increase their ratio of teaching to administration hours. NZ U3As offer a high percentage of courses from tutors' homes. In contrast Australian groups offer fewer courses from private homes and, instead, run the majority of courses from public locations such as community halls. Because private homes have limited space NZ groups may need to run a greater number of small courses to meet members' needs, thereby increasing the relative number of teaching hours.

## **Some characteristics of U3As in Australia and New Zealand**

### **Membership of U3A groups**

U3A in Australia has grown rapidly since its introduction there in 1984. Within the first five years the movement had spread to every Australian State and Territory. By early 1998, there were 124 autonomous groups in Australia, with a total membership of more than 35,000. U3A reached New Zealand in 1989. Currently, 21 groups there are providing for a membership of 2700, mostly in major population centres throughout the North Island. For some reason U3A has taken a considerable time to gain a foothold in the South Island. Only one South Island group is listed in the 1998

U3A Directory for Australia and New Zealand and this was in New Zealand's second largest city, Christchurch. The rapid growth that has occurred in both countries is almost entirely the result of grassroots initiatives from older people themselves. There has been no systematic funding or concerted support from government or adult education agencies to help foster the movement, although some groups have received start-up assistance from local government or other organisations sympathetic to the U3A ideal. Groups in both countries have consistently resisted overtures for the formation of a national U3A organisation similar to that in the UK, which successfully promotes the U3A movement in that country.

The 97 groups that responded to the survey ranged in size from less than 50 to more than 4000 members. Most New Zealand groups, including those in large cities, prefer to keep membership numbers to fewer than about 200. The reason for this is an expressed concern that larger groups could lose the important aspect of friendship that is seen as being a distinguishing characteristic of close, tightly knit groups. For example, in New Zealand's largest city of Auckland, more than a dozen autonomous groups operate, most of which maintain a membership ceiling of about 200. As membership approaches this limit another group is split off to serve a convenient geographical cluster. This pattern also tends to occur in the Wellington region.

The majority of Australian groups are also small, in fact 48 of the 83 responding Australian groups (58%) have fewer than 200 members. However, most of these groups are in small population centres and are unlikely to have experienced the same growth pressures faced by groups in larger cities. For these groups the issue of optimum membership numbers is probably not yet a concern. A number of quite large groups operate very successfully in Australia. In general, administrators of these groups favour larger groups because of the greater variety of courses and services that can be offered to members. The 16 largest Australian groups, five of which have memberships greater than 1000, accounted for 72% of the nearly 25,000 Australian members represented in the survey. The largest grouping is Sydney U3A with more than 4000 members operating in 7 regions. The Sydney U3A network comprises a central Management Committee, which handles finances, newsletter production, theme lectures, travel and other "umbrella" activities. However, the regions themselves operate semi-autonomously. Members of Sydney U3A may attend courses in any region.

### **Maximum membership size**

Participants were asked what maximum membership they believed their U3A could accommodate under present conditions and to indicate what factors might influence growth beyond that point. Correlations between current membership and maximum membership were high for both countries (Australia:  $r = 0.96$ . NZ:  $r = 0.95$ ). In other words, regardless of current membership most respondents to this question felt that their U3As were operating near maximum capacity. By contrast most of the large U3As could see no reason to limit their growth and were continuously involved in recruiting new members. Preferences for group size may well be based on perceptions of the success of one's own organisation.

A shortage of volunteers (both tutors and administrators) was given as the main deterrent to future growth. Many respondents indicated that their volunteers were currently working at close to maximum capacity. In contrast, the proponents of

growth envisaged that an influx of new members would provide new volunteers who would create new learning opportunities and keep the organisation moving. The lack of suitable accommodation was a structural factor mentioned as being likely to inhibit future growth.

### **Assistance from external organisations**

In addition to the very heavy emphasis on support by member volunteers, most U3As receive considerable in-kind support from organisations that are sympathetic to the U3A ideal, for example, local governments, libraries and tertiary institutions. These, and other local community organisations, provide services and resources to U3As, like free or subsidised teaching rooms, office space, and assistance with publishing and distributing newsletters. Without in-kind subsidies of this nature, few U3As would be able to operate within their remarkably limited budgets.

Although most U3As were happy to receive in-kind assistance, and were always open to appropriate offers of external support that would help them to increase the range of services to members, a number of groups expressed opposition to receiving external support. This position appears to be more prevalent among New Zealand groups, although some Australian groups were also opposed. Objections to receiving external assistance were raised mainly on the grounds that this kind of support is transient and could make U3As vulnerable to changing market forces.

Undoubtedly, isolated examples of unexpected withdrawal of resources will occur from time to time, creating difficulties for U3A groups that have come to depend on this support. However, for a large majority, the benefits far outweigh potential problems. Even in these financially difficult times it seems unlikely that supporting groups will require U3As to pay "market costs" for services. This is because many supporting organisations receive community recognition and taxpayer approval for their support of worthy community groups like U3A. Moreover, many in-kind subsidies do not readily translate into a direct dollar cost to sponsoring organisations. Thus, there is less likelihood of in-kind support being withdrawn during difficult financial times, than if cash grants were provided.

### **Future directions**

A recent study of leisure organisations for older people argued that the viability of these organisations was related to management's capacity to recognise and adapt to social change (Swindell and Mayhew, 1998). Many leisure organisations for older people are heavily reliant upon volunteer leadership. It appears to be particularly important that volunteer managers have sufficient flexibility and vision to tailor their programs to the evolving interests of members, and to excite the interests of would-be members, particularly new retirees. Organisations run by managers who persist with the old ways of doing things are unlikely to prosper.

U3As in Australia and New Zealand are growing strongly. Most are characterised by a sense of vitality and dynamism and many offer new courses such as introductory computing, and the use of the Internet. This readiness to move with the times suggests that U3A administrators have high levels of managerial expertise and experience, and that these attributes may have been carried over from their Second Age working lives. To determine whether this might be so, participants were asked to name or describe

the occupations that current major office bearers had held immediately before their retirement (eg. carpenter, small business owner, accountant, home-maker, teacher etc.) The diverse occupations were then grouped into one of four major categories, namely professional, trade, home-maker and business. As speculated, a large majority of key office bearers (president, vice president, secretary, treasurer) formerly held professional positions requiring higher education qualifications. Ninety-one per cent of New Zealand U3A office bearers formerly worked in the professions. In Australia, the figure was 74 per cent. In addition, before their retirement, many U3A administrators in both countries had held management and other positions of responsibility. If this high level of managerial expertise remains a characteristic of U3As of the future, the organisation would appear to be well placed to manage social change, and to remain relevant to the lives of new cohorts of retired people.

To provide a "snapshot" of how administrators reacted in 1997 to a number of scenarios that have the potential to influence their specific groups, and the U3A movement in general, participants were asked to respond to 18 futures-oriented statements. For each question they were asked to tick one of 5 options, ranging from strongly agree to strongly disagree. Options were later coded from 1 to 5 (1 for strongly agree to 5 for strongly disagree) and responses were totalled for each country, and averaged. Responses are summarised in Table 2.

In Table 2, average responses on a five point scale are shown for each country. Lower numbers that cluster around 1.5 to 2.5, on average indicate that respondents agreed with a statement; responses clustered around 3 were neutral; and higher numbers show that respondents disagreed with a statement.

Items 1, 2, 3, 8 and 10 relate to the self-help philosophy. With the exception of item 10 average responses were similar for both countries. Item 10 was a notable exception in that it appears to show that Australian U3As were supportive of the idea of governments providing funding to help U3As to develop, whereas NZ U3As opposed the idea. However, in this case, averages give a distorted picture of the Australian position because five of seven Australian states opposed this idea. The exceptions were the two southern mainland states of Victoria (1.9) and South Australia (1.8) whose responses were significantly different from the other states [ $F(6,91)=4.72$ ,  $p < .001$ ]. The large number of responding groups from Victoria ( $n=34$ ), almost all of which were very supportive, skewed the Australian average towards apparent national support for item 10. A possible explanation for the strong support shown by U3As in Victoria, may be attributed to the effective communications which exist between U3As there, and their past successes with attracting one-off funding for special purposes. Shortly after U3A began in Victoria in 1984 a strong U3A network developed. Currently, 54 of 56 U3As in Victoria belong to the network. These groups meet regularly to discuss U3A matters, including applying for occasional government grants for educational purposes. Because of their success in attracting one-off grants most U3As in Victoria appear to be comfortable with the idea that external funding can be used to aid self-help education and this need not be detrimental to the U3A philosophy. Similarly, in South Australia, communications between the U3A groups are good, although no formal network exists. Most South Australian groups have been recipients of "Small Grants to Seniors" funding from government and this could also help to explain their strong support for item 10. A number of other groups in Australia and NZ have also been recipients of government or other grants, and they too

responded positively to item 10. Clearly, many U3As are comfortable with the notion that occasional financial assistance is not incompatible with their organisational goals.

**Table 2. Possibilities for the future**

In the future ...	Aust (n=84)	NZ (n=14)
1. U3As will have difficulty attracting volunteer administrators	2.5	2.7
2. U3As may need to pay an administrator	3.3	3.7
3. payment for some administrative services would undermine the self-help nature of U3As	2.3	2.1
4. U3As will help in libraries, art galleries, museums etc.	2.6	3.2
5. U3As will carry out research relevant to the wider Third Age population	2.2	2.6
6. U3As will need to attract under-represented groups	2.3	2.6
7. U3As will use distance education methods to help mentally alert frail elderly and isolated older people	2.3	2.8
8. U3As will pay outside experts to run some specialist courses	3.8	3.4
9. U3As will pay for specialist teaching facilities	3.1	3.4
10. governments should be asked to provide funding to help U3As to develop	2.4	3.5
11. there will be growing technological demands on older people	1.8	2.4
12. there will be fewer jobs therefore younger members of U3A	2.0	2.1
13. members' interests will differ from today's	2.5	3.1
14. there will be more emphasis on retired people helping themselves	2.0	2.0
15. there will be much greater communication and sharing resources between U3As	2.1	2.1
16. U3As will run more activities away from home base eg educational travel	2.1	2.5
17. members should pay considerably more for higher level of service	3.5	3.6
18. a centralised "clearing house" for borrowing resources would assist U3As	2.0	2.6

Added support for the idea that occasional grants are not necessarily irreconcilable with the self-help U3A philosophy can be drawn from recent United Kingdom examples. In 1997, the Third Age Trust, which is the national network of U3As in the

United Kingdom, was awarded a grant from proceeds of the national lottery of nearly 300,000 pounds to aid U3A developments there. Individual U3As in the UK have also been successful in attracting specific purpose grants from the lottery to assist with purchasing teaching resources and equipment such as computers. The self-help movement evolved in the UK and most U3As there remain very staunch advocates of the self-help model, rather than of one that involves a dependence on university or other Second Age teachers. Australian and NZ U3A groups that are opposed to external grants yet, at the same time, recognise a need to overcome problems that are hindering their progress, may wish to reflect on their understanding of the self-help philosophy. It may well be that too rigid an interpretation of “self-help” may be disadvantageous to members' interests.

### **U3As and research**

A number of groups from both countries strongly supported the item 5 notion that U3As will carry out research relevant to the wider Third Age population. The desirability of third-agers undertaking research was proposed by Laslett (1989), one of the original founders of the self-help movement. Indeed, one of 19 fundamental guiding principles of the self-help movement states that “every member will be expected where possible to have a research project of his or her own, and to write up its results” (p. 179).

It is probably fortunate that this principle was neither well known nor enforced within U3As, particularly during the movement's early years of rapid community acceptance. By its nature research is an exclusive activity. Almost certainly, a research requirement would have substantially changed the broadly based membership profile which, as an earlier study showed, included people from very diverse educational backgrounds, a majority of whom were women (Swindell, 1993). Although that study showed that Australian U3As attracted mainly middle-class people with above average levels of education for their age group, 17 per cent of members had received two years or less of secondary schooling as their highest formal education background. The majority of this latter group were aged 75 and older. It would have been a very considerable loss to adult education, and indeed to society as a whole, if self-help U3As had evolved in a way that tended to exclude very old people and others with limited formal educational experience. An organisationally imposed barrier to participation, such as an expectation that U3A members would become involved with research, would probably have created the perception in the minds of many older learners that they were not “qualified enough” for U3A. Even though Laslett's (1989) vision was for U3A to be an egalitarian organisation it seems likely that a research requirement would have curtailed U3A to such an extent that it became an elitist club for quite small numbers of academically advantaged, predominantly male, retired people.

Nevertheless, the idea of U3As having a formal research elective as just one of many intellectually stimulating options available to members, is an intriguing idea. Although no recent large studies have reported on U3A membership characteristics, it seems likely that U3A continues to attract a substantial proportion of highly qualified retired people. Some support for this statement comes from a 1997 limited circulation publication detailing developments in U3A Hawthorn, one of the oldest and most active groups in Australia. Of the 900 members of U3A Hawthorn, 56 per cent had undertaken post-secondary studies. This is probably an unusually high percentage

because the Hawthorn U3A membership is drawn from several suburbs with higher than average socio-economic characteristics. In addition to the Hawthorn U3A study, as shown earlier the overwhelming majority of office bearers of U3As formerly held professional positions in the paid workforce. These data suggest that high levels of expertise are commonplace within U3A. From amongst this pool of expertise U3As could doubtlessly find leaders who would value the idea of training and leading U3A research teams.

Although few U3As in Australia and NZ currently promote research, this is probably because the idea has not been widely discussed. Most U3A managers are occupied by the exigencies of day-to-day organisation, and research is not amongst the members' high priorities. However, the high level of support for item 5 suggests that research would be a timely topic for consideration. In fact, a number of novel research and development projects for the benefit of the wider ageing community have been carried out by Australian and NZ U3As over the past few years. Because U3As in Australia and NZ have no systematic mechanism for sharing ideas nationally it is difficult to obtain information about matters like research. Therefore, the following list is merely indicative of the kind of research projects that U3A is capable of supporting. Some of the projects completed or initiated by Australian groups include:

- a survey of the characteristics of leisure organisations for older people;
- surveys of the wider ageing population to determine how U3A might better meet community needs;
- a compendium of all clubs and organisations for the over 50s;
- educational/cultural visits by Japanese women over the age of 60 with a view to introducing U3A ideas to Japan;
- a program using computers to help develop hand-eye coordination and improve the short-term memory of stroke victims;
- teleconferencing as a means of providing programs of intellectual stimulus for housebound frail elderly people;
- quality-of-life programs by teleconference for the healthy ageing living in rural areas;
- a study of transport problems faced by the older population in highly delocalised communities; and ,
- an investigation into possible links between health and U3A membership.

A recent report into developments in adult and community education in Australia since 1991 (Senate Employment, Education and Training Reference Committee, 1997) supported a number of important recommendations relating to later life adult education. Amongst these was the recommendation "...that the Commonwealth government establish a dedicated research program to examine the relationship between intellectual activity and good health, and the ways in which that relationship might be enhanced" (p. 109). This recommendation tacitly acknowledges the as yet unproven, but tantalising implication that late life programs of cognitive challenge may give rise to "value added" health effects that are indirectly associated with the activity. For example, in reviewing evidence which indicates that education may protect against dementia, Orrell and Sahakian (1995) suggested that adult education programs and stimulating mental activity may help in the development of coping skills and strategies for solving problems. In turn these may help to offset the cognitive

affects of normal ageing and delay the clinical symptoms associated with diseases such as Alzheimer's. If this is true, the finding would be of significant economic importance. Katzman (1995) observed that the economic cost of caring for demented older persons in the United States is over 100 billion dollars a year and merely by introducing a 5-year delay in the onset of symptoms would halve the number of dementia patients. Educational attainment may also be directly related to health in later life. Guralnik, Land, Blazer, Fillenbaum and Branch (1993) found that educational attainment has a strong influence on total life expectancy and active life expectancy among both blacks and whites. They described their finding as being of great importance "because education level, and socioeconomic status in general, are alterable risk factors" (p. 115).

Regardless of whether or not it is possible to establish a link between programs of late life cognitive challenge and aspects of good health, education has a number of intrinsic attributes that manifestly advantage participants (Groombridge, 1982). Notable amongst these is a belief that education is a major factor in enabling older people to cope with numerous practical and psychological problems in a complex and rapidly changing world. Cognitively alert individuals are more likely to develop a range of options that will assist them to maximise their independence than those who give up trying. With its cadre of alert, active, well-qualified members, many with first hand appreciation of the exigencies of ageing, U3A appears to be an organisation that is tailor-made to carry out research programs that could benefit the wider ageing community.

### **Technology and U3A**

Items 11 and 12 show that respondents believe that technological demands on older people will grow, and fewer jobs will lead to younger members being attracted to U3As. Electronic communications offer considerable potential for U3As to provide new services for members as well as for reaching out to new groups. Increasing numbers of U3A members own their own computers. Indeed, U3A Canberra reported that 10% of its 1600 members own computers. In the near future, it is possible that large numbers of U3A members will want to, and be able to communicate with other U3A members by computer. Since late 1996 U3As in Australia and NZ have had the option of joining an informal e-mail communications network called U3Atalk. By early 1998 more than 50 U3As, including some in the UK, were exchanging ideas and news, or debating matters of interest via this medium.

It requires no large leap of technological faith to envisage how U3As could use this convenient, inexpensive and non-intrusive medium to run courses at a distance for incapacitated older people, or for people isolated by distance. Tutor expertise could also readily be shared electronically via an electronic U3A without walls. Members could electronically visit specialised programs run by U3A tutors from anywhere in the world. Course notes could be made available from the tutors' Home Pages on the World Wide Web, and student interaction could take place by e-mail. The electronic sharing of resources in this way would help to address some of the earlier mentioned problems about too few tutors, difficulties with locating teaching venues, and a desire by some members to attend more courses of a rigorous academic nature.

The above is not to imply that technology will replace face-to-face interaction. One of U3A's unknown, but probable major strengths is its role in fostering social networks

amongst members. Social interaction is highly valued in U3As. In fact, survey respondents rated the provision of opportunities for social interaction with like-minded colleagues as the second most important of U3A's major accomplishments, behind the provision of intellectually challenging opportunities. Research findings over the past two decades point consistently to a relationship between elderly people's support networks and well-being. Bowling (1994) observed that fairly strong evidence exists for a relationship between social support, social network development, health status, mortality, and risk of entry into institutional care. For many older people whose well-being may have been jeopardised by events such as retirement, relocation, divorce, or the death of a spouse or friend, organisations like U3A may provide important opportunities for re-establishing social networks. Regardless of possible well-being implications, many U3A members clearly enjoy the opportunity of spending time in the company of lively and alert colleagues. The social implications of electronic networking are largely unknown. However it is difficult to believe that cyber space will provide an alternative to the kind of social networking so valued within U3A circles.

## **Conclusion**

This study has shown U3As in Australia and New Zealand to be dynamic organisations that provide a very substantial service to the community. In the first section a method for quantifying a monetary value for U3A voluntarism was discussed. The principal motivation for this calculation was to demonstrate a means by which the hidden worth of a valuable community service like U3A can be presented in the financial terms that are the major focus of many of society's current decision makers. It is important to emphasise that the calculation is intended solely as a means of focusing attention on the nature and extent of a valuable community service. There is no suggestion that U3A volunteers should be paid for their expertise. Indeed such a move would undermine the self-help nature of the movement, which is its greatest strength.

The idea of calculating a monetary value for voluntary services is one that many organisations for the ageing, whose contributions tend to be taken for granted, might wish to adopt. Throughout Australia and New Zealand there are thousands of clubs and societies for older people run by unpaid volunteer members. Regardless of the nature of the activities offered by these organisations all have the potential to enrich members' social networks. Social isolation has been reported to be as great a risk to health as smoking (House, Landis and Umberson 1989). If this is so, by providing the opportunity for older men and women to maintain or increase their social networks, clubs and societies may be indirectly contributing to the nation's health and wealth. Every dollar saved through minimising demands on medical and other subsidised social services is a dollar available to more needy sectors of society.

If calculations of the kind undertaken in this study were applied to the numerous clubs and societies for older people, the total could well amount to hundreds of millions of dollars annually. This is a currently unrecognised component of national productivity. Publicising this kind of information would surely be helpful in overcoming the patronising and dated images of retired people, which are held by so many people in society, including some of the ageing themselves.

The second section of the paper revealed many similarities between the U3A approaches adopted by Australian and NZ groups, but it also showed that there were a number of characteristics which are clearly specific to each country. U3As in both countries are strongly guided by the over-riding self-help philosophy, although many Australian groups may be somewhat more pragmatic in their interpretation of “self-help” than their NZ counterparts. Apart from a few notable exceptions, communications between U3As tend to be sporadic and ad hoc, thus, it is somewhat surprising that greater differences were not observed amongst the many autonomous groups.

Organisations for older people must be prepared to adopt new practises and react rapidly to social change if they are to appeal to successive cohorts of retired people. The third section of the paper showed that U3A managers in both countries are open to new ideas and are prepared to consider ventures that lie beyond their present bailiwick. This bodes well for the future of the U3A movement because the lives of tomorrow’s retirees are likely to differ as much from those of their parents as their working lives do now. As baby-boomers continue to swell the ranks of retirees early in the new millennium they will bring with them positive expectations of life in the Third Age that the hobby courses and bingo view of ageing cannot meet. They are also likely to face growing pressures to fund more of the services that were once routinely provided. Thus, it makes sense for society to emphasise approaches that promote independence and opportunities for well-being. The self-help model of U3A is a pointer to the kind of organisation that is likely to be highly effective in an ageing society.

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