AN EVALUATION OF THE ROLE OF THE UNIVERSITY OF THE THIRD AGE IN THE PROVISION OF LIFELONG LEARNING

by

LYDIA KAROLA HEBESTREIT

Submitted in accordance with the requirements

for the degree of

DOCTOR OF EDUCATION

in the subject of

COMPARATIVE EDUCATION

at the

UNIVERSITY OF SOUTH AFRICA

PROMOTER: PROF E. M. LEMMER

NOVEMBER 2006

Student Number 343-675-6

Statement of Authenticity

I declare that **AN EVALUATION OF THE ROLE OF THE UNIVERSITY OF THE THIRD AGE IN THE PROVISION OF LIFELONG EDUCATION** is my own work and that all the sources that I have used or quoted have been indicated and acknowledged by means of complete references.

……. …….
SIGNATURE DATE
(Miss L. K. HEBESTREIT)

Abstract

During the past thirty years several models for lifelong education after retirement have been developed worldwide, one of them being the University of the Third Age (U3A). This study explored the contributions of the U3A to the educational needs of older adults and evaluated the benefits they perceived from their participation in U3A by means of a literature study and an empirical investigation. The latter used a survey to explore the experiences of U3A members of two U 3As and presidents of 68 U3As in Victoria, Australia by means of two different questionnaires. As only 1.47 percent of the over-55 population of Victoria are U3A members, the survey also investigated barriers to U3A participation in general and with special reference to the male population. The findings indicated that member respondents were very satisfied with their U3A experiences which had made substantial differences in their lives. Both male and female respondents saw personal, mental, social, and physical improvement as a result of U3A participation. The majority indicated that participation had improved their intellectual development. Significant differences in the perceptions of male and female participants emerged: female members outnumbered males by three to one. Both the presidents and the members expressed some programmatic concerns, primarily obtaining tutors and classroom availability. The subject areas covered by courses presented were extensive. There was a difference in the subjects desired by males and female respondents; very few courses are offered in science and economics. Some barriers to participation identified are a lack of awareness of U3A, the stereotypical attitudinal barrier of 'I am too old' and negative past educational experiences. Moreover, U3As should increase marketing endeavours. Although most U3As advertise, almost a third of the respondents indicated that they would have joined earlier if aware of U3As. A contributing factor appears to be a virtual lack of research and information provided in educational academic journals and other media about lifelong education after retirement. Based on the findings, recommendations were made for future research and for improved practice in the U3A environment as a means to enhance the quality of life for older adults.

Keywords

Learning; Lifelong learning; Learning models; Non-vocational; Leisure-pursuits; Serious leisure; Peer teaching; Self-help philosophy; Older adults; Retirees; Third Age; Academic; Intelligence; Memory; Successful aging; Social contacts; Well-being; Confidence; Self-esteem; Independence; Barriers to learning; Stereotypical images of old age.

Acknowledgements

I am very grateful for the assistance and support given in the preparation of this thesis and the encouragement during the later stages of the thesis by my supervisor Professor Eleanor Lemmer, School of Education, University of South Africa.

It would not have been possible to complete this project without the contribution provided by the members of Box Hill and Frankston University of the Third Age who participated in the questionnaire process. I thank them for the many encouraging remarks they wrote on the questionnaires in particular and the letters and phone calls of support I received from them.

I also appreciate the generous contribution the Presidents of the Universities of the Third Age of Victoria made by completing and returning the surveys sent to them, and also for the many remarks of support.

I thank Mr Colin Mayfield, President of Box Hill U3A, Mr Frank Reed, President of Frankston U3A, and the members of the Management Committees of Box Hill and Frankston University of the Third Age for giving permission for the distribution of the questionnaires to the members of both of the U3As. I would specifically like to thank Mrs Natalie McGregor and Mr Greg McGregor, the Secretary of Box Hill U3A and the Administrative Assistant of Frankston U3A, for the part they played in the distribution of the questionnaires.

My sincere thanks to my Lutheran Church parishioner friend, Dr Darrel Caulley O.A.M., for giving not only professional advice but also encouraging comments on several chapters of this thesis.

I am very grateful for the help I received from the Network-Victoria Inc., especially from Mrs Sheila Moore. I would also like to thank Mr John Condron, President of U3A Casey, and the U3A members of the Current Affairs class who so willingly completed the pilot-testing questionnaire. I also appreciated the remarks they made and the help they gave.

Finally, my heartfelt thanks for the support and assistance given to me by my friend, Nola van Eede, with the preparation for the distribution of questionnaires and for her understanding, support, and patience during the writing of this thesis.

TABLE OF CONTENTS

CHAPTER 1: BACKGROUND TO THE PROBLEM, PROBLEM FORMULATION AND AIMS

CHAPTER 2: LIFELONG LEARNING AND THE NEEDS OF THE OLDER ADULT

LIST OF TABLES

CHAPTER 1 BACKGROUND TO THE PROBLEM, PROBLEM FORMULATION AND AIMS

1. INTRODUCTION

Older adults comprise the fastest growing sector of the population and yet governments in the Western world have been very slow in recognising the need to provide educational opportunities for the elderly. Withnall (2000) referring to the United Kingdom (UK) and Jarvis (2002) referring to Denmark maintain that people who are "post-work" are not included in government proposals and older people are still largely marginalised in educational policy circles. Moody (1988: 212, cited in Glendenning 2000: 10) has suggested "that public policy still looks on the education of old people merely as a frill and not having anything to do with human development in the second part of life".

To satisfy the learning needs of this neglected section of the population, the elderly have taken the problem of continuing with lifelong education after retirement into their own hands and developed a variety of educational models to meet their particular needs. This study will assess the provision of lifelong learning for the older population and focus particularly on one of the 'third age' education models, that of the University of the Third Age (U3A).

1.1 BACKGROUND TO THE PROBLEM

Lifelong education for all has become a slogan that governments use for election purposes, but the reality is different. Very few countries have included older people in their national policies for lifelong learning (Withnall, 2000; Jarvis, 2002).

In the groundbreaking Fauré Report, "Learning to Be" (1972), commissioned by UNESCO, lifelong learning was advocated for all, a vision that was soon termed utopian by many. Before and after the report was issued, the bulk of publicly funded opportunities for learning have historically been reserved for the young, as an engine of economic expansion. According to Wain (2001: 187), "lifelong learning is a matter of sheer economic and industrial survival for both individuals and companies".

The UK, the European Commission, and many other Western governments have produced Memoranda and White Papers to acknowledge the importance of lifelong learning. There has been a great deal of rhetoric but few nations have had the political will to get involved with third age education. Learning continues to be viewed in a narrow way, as training for work and training in work, directed primarily at young and middle-aged people. We have a long way to go "to unlock the potential of older people" (National Institute of Adult Continuing Education [NIACE] 2000a).

Research interest in education for older adults is relatively recent in the academic community. As a result, it has not yet settled into its own discipline, with a widely accepted theoretical framework, research protocols, or validated instrumentation. As background, however, the study of aging has a long history, and has been approached by researchers in medicine, psychology, and sociology. In Western and industrialised countries, increased longevity and the growth of that segment of the population over the age of 60 has made aging a political and economic issue as well. Education for older adults has still not achieved legitimate status.

1.1.1 Importance of the Study

There is still little agreement about the meaning of old as applied to people. Researchers have used the terms elderly, seniors, the young-old, the old-old, and retirees, with no clear definition of these terms. In this study, the term older adult(s) is used, to distinguish this group from those engaged in career building, child rearing, home making, and other adult tasks usually associated with the middle years of the life span.

There are more older adults in the world than there have ever been before. During the past century, more than 20 years have been added to the lifespan of people in Australia: for females, it is now 82.6 years and for males, 77.2 years (ABS, 2003). The proportion of people over 60 is about 12 percent of the population. People now have 20 to 40 years to enjoy the freedom that retirement brings. How people use this time poses some interesting questions.

Research today suggests that many older adults are interested in learning. Education for adults, particularly older adults, is beginning to become a serious social, political, and economic enterprise, as notions of retirement change along with other conceptions of the social patterns of life. In response to these changes, researchers and social scientists are beginning to look closely at the concept of leisure as it has traditionally been defined. Recent research indicates that older adults are interested in learning long past the age when social norms dictate that they should have lost interest. Many want to learn simply for the sake of learning, others because of the social contacts they can achieve by joining a community of learners, and still others want to learn so that they have a purpose in life.

There are a number of third age educational models in many countries. They have all been developed specifically to meet the needs of older adults. Elderhostel, in the United States, founded in 1975, provides "affordable educational adventures" for individuals aged 60 and over (Kressley and Huebschmann, 2002). There are also Institutes for Learning in Retirement (ILR). Another well-known model in many countries 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 first University of the Third Age, *L'Université du Troisième Age* (Glendenning, 2001), was developed in Toulouse in 1972 to improve the quality of life for older adults. It became known as the French model. The university faculty, on traditional campuses, conducted courses for third age students. French model third age university programmes are still offered by many universities in Europe, and participating older adults usually pay reduced semester fees. Laslett (1996: 3) gives the following explanation of the term,

Third Age: “The Third Age is a phrase of French or Spanish origin, and was used in the title of *Les Universités du Troisième Age*.”

Nearly ten years later, the British model of third age education originated in 1981 when Peter Laslett (often referred to as the father of the British model, U3A) convened a meeting of social scientists at Cambridge University. The model they designed differed from its French counterpart. The model is based on self-help and self-sufficiency, and is not usually affiliated with traditional educational institutions. It is open in the sense that there are no academic admission requirements and no examinations. One of the principles, as stated in Laslett (1996: 228), is as follows: “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.” It is this British U3A model that has become popular in the UK, Australia, New Zealand, South Africa and other parts of the world.

The first U3A in Australia was developed in Melbourne in 1984. The U3A movement spread rapidly through the state of Victoria, and later throughout the whole country. According to McDonell (1995: 3), “U3As have become Australia’s fastest growing educational movement.” While it has been a rapid development, the rate of actual participation among the entire older adult population is still small. There are a number of barriers that prevent older adults from continuing with lifelong learning.

There is a fundamental difference between general education and Third Age learning (Jarvis 1998, as cited in Dale, 2001: 795): “Third Age learning is non-vocational, is co-operative, aimed at human fulfilment and it is a leisure time pursuit. It is a re-emergence of liberal adult education.” It remains unclear what proportion of older adults would participate in educational activities if the activities were readily available, affordable, favourably presented, and widely known. Jones (2000: 339) believes that colleges and universities have been seriously underestimating the interest of older adults in studying for a degree or certification. He points out that when U3A first started in the UK, older people attending any kind of university simply for the pleasure of learning, “was such a

novelty that study for the sake of achievement and of identifiable qualification was not at all favoured". Jones believes, however, that now that the UK's Open University is well established, the idea is no longer novel. Evidence is accumulating that learning provides multiple benefits for older adults. The value for the elderly of being mentally active and in control of their own lives has been demonstrated in several studies. In a NIACE survey (Aldridge and Lavender, 2000), "The Impact of Learning on Health", a third of the 473 respondents reported positive outcomes related to their learning activities. They reported mental and physical improvement, as well as being happier, more confident and experiencing improved self-esteem. Antonucci and Akiyama (1991) believe that aging well depends fundamentally on the quality of the social relationships older adults form and maintain in later life.

Swindell (1999) concluded from his review of the research that well-being and social networks have consistently shown to be positively correlated. When older adults are queried about their motivation for seeking educational opportunities in later life, the social relationships offered in educational programmes appear to be an important factor in their interest. Andrews, Clark, and Luszcz (2002: 761) found that psychological adaptability and a "stronger sense of self" were associated with successful aging.

Dench and Regan (1999) report that their survey illustrates how "learning has an impact on an individual's well-being, and to a lesser extent on their wider involvement in life". Therefore, it seems likely that activities that support high morale and the perception of control, like late life education, may actually contribute to longevity. Wicks, the Minister for Lifelong Learning in the UK (NIACE, 2000b), declares, "Learning is not just about employability. In today's research of over 300 people aged over 50, more than half said learning improved their enjoyment of life and self-confidence and a third said learning improved their health. These are the sort of findings which demonstrate how important and valuable lifelong learning really is."

1.1.1.1 Barriers that Prevent Older Adults from Continuing with Lifelong Learning

The percentage of retirees in Australia who are members of U3As is low. McDonell (1998, as cited by Dale, 2001: 791) has estimated that "approximately 1.5 percent of retired people in Australia attend U3A courses".

The enrolment statistics of universities in Australia of students above age 55 is, however, lower than U3A enrolment. Monash University, one of the large Melbourne universities, states that: "There were 431 enrolments aged 55 and over in 2003. This represents around 0.8 percent of the total Monash student population (49721 enrolments)" (Monash University, 2004). The number of students 60 years and over at Monash in 2003 amounted to only 0.2 percent of the student population.

Why do so few older adults take part in formal learning? In this and the next chapter a number of barriers are mentioned that may deter adults from participating in learning opportunities. Several models have been developed to explain these participation barriers. Cross (1981: 98) categorises barriers as situational, institutional, and dispositional, while Darkenwald and Merriam, (1982: 137, as cited in Findsen, 2002) categorise barriers as follows:

- *Situational:* These relate to an individual's life context at a particular time, that is, the realities of one's social and physical environment.
- *Institutional:* Those erected by learning institutions or agencies that exclude or discourage certain groups of learners.
- *Informational:* Students' lack of awareness regarding the availability of learning opportunities.
- *Psychosocial* (attitudinal or dispositional): Individually held beliefs, values, attitudes or perceptions that inhibit participation in organised learning activities.

Situational barriers: For the older learner, transportation issues perhaps constitute a difficulty. Disabilities, which limit mobility, or a life situation, which precludes driving, are likely to hamper access to education venues (Findsen, 2002).

Institutional barriers could include non-user-friendly enrolment procedures, high fees, inappropriate venues or unexciting methods of teaching.

Informational barriers include lack of adequate information about the educational opportunities available for older learners may contribute to their poor participation. Cross (1981) notes that not only information, but accurate information was necessary for learners to perceive their opportunities fully. McGivney (2004: 92–93) also refers to lack of awareness in her discussion of male participation, which, as I will document in this thesis, is very low for older adults: "A persistent finding of research into men's participation in and attitudes to learning is their widespread lack of awareness of local learning activities. This indicates that providers are not effective in the way they disseminate information about the services they provide, or that men themselves turn a blind eye and a deaf ear to information on activities they consider to be irrelevant or of little value to them." McGivney maintains that women, on the other hand, will go out of their way to find out what is on offer in an education centre or institution.

Psychosocial barriers (attitudinal or dispositional): Findsen (2002) believes that many people may believe in the adage, 'I'm too old to learn'. She states, "Older learners may also be generalising from previous unsatisfactory learning episodes which have left them feeling inadequate, resistant, or just uninterested in re-engaging with an environment which was painful or boring at an earlier time."

Another (psychological/dispositional) barrier is a negative view of oneself or low self-esteem due to a poor or negative educational background. As will be mentioned later, previous experience at school may often determine attitudes to lifelong learning. As Carlton and Soulsby (1999: 74) observed: "Perhaps their experience at school has been of failure, frustration and lack of communication. They are unconvinced that anything called 'education' is really useful, or that learning is enjoyable." For older adults in that

situation to take up learning, the programme has to be seen as useful or interesting. “If people with poor or negative educational backgrounds, low or semi-skilled work experience, low self-esteem and relative poverty are to engage in any learning activity it has to be relevant to their lives” (Carlton and Soulsby, 1999: 73).

McGivney (2004: 88–89) writes that evidence suggests that there are multiple obstacles that prevent many men from engaging in education and training. He writes, “Men relate to unsatisfactory school experiences and constructions of what constitutes an appropriate masculine identity; a culture that encourages men to cling to traditional roles and patterns of behaviour in which learning does not figure as hugely important, fear of losing face among male peers, perceptions that engaging in learning is for women rather than for men and that learning does not offer tangible rewards.”

Scholars differ in their explanations of the feminine dominance in third age educational settings. Many women, during their younger years, were unable to pursue learning in a structured way. This may be an important factor in explaining why women now outnumber men in third age education programmes. Today’s third age cohort grew up during the depression and World War II. Swindell (1991) maintains that “it was unfashionable for teenage girls to progress through high school”. Swindell’s (1991: 7) study showed, however, that female U3A members had a higher than usual educational background, while Williamson (2000: 56) found in his research that some of the women had been drawn to U3A to make up for “lost educational opportunities”. He also found that the sample “…was less well-off and possessed lower levels of schooling”.

The findings of Swindell and Williamson differ as far as the educational background of female U3A members was concerned. Swindell surveyed 12 U3A campuses in the Australian states of Queensland, South Australia and New South Wales. He used a traditional postal survey technique. Williamson surveyed the members of one U3A campus in New South Wales, which had not been surveyed by Swindell. Williamson obtained data using a combination of postal survey and a follow-up interview with a sample of those surveyed. The questionnaire he used was adapted from an instrument developed by Swindell. While Williamson’s study concentrated on the gender issues in

participation in learning, Swindell's study was concerned with the characteristics and aspirations of older learners.

Scala (1996: 765) found in her study of university students over the age of 60 that women were more likely to state that they took up learning opportunities because they "always wanted to go to college, but never had the chance", and that "women of the current cohort of older adults were unlikely to have received much in the way of higher education . . . it was considered inappropriate or unnecessary". Others have found a difference in the way men and women participate in education. Derichs-Kunstmann (1995) found that older women are oriented outward, while men are oriented inward, so that women participate more readily in education for its own sake and for the social opportunities it affords them, while men tend to focus on acquiring information or knowledge they can immediately use, and are not always attracted to educational programmes for that purpose. The difference here, Derichs-Kunstmann believes, is a critical one that needs to be understood, especially by those who design educational experiences for older learners.

Gorard, Rees, Fevre and Welland (2001: 174) found the strongest predictor of participation in lifelong learning to be gender, both in terms of opportunities and barriers. They comment that many women are unable to pursue learning in any structured way until their family obligations – to children, spouses, and parents – have been met. Research to date has supported this finding. The feminisation of U3A programmes may constitute a barrier to the participation of some men. The majority of the members of U3As are women (70 to 80 %), and this may have created an image problem by virtue of greater enrolment. Davidson and Arber (2002), in their study of older men's membership of social organisations, found that men avoided organisations where older women dominate the membership. One comment was that "men feel threatened by the presence of all these old women". Cusack (1998: 51), who conducted her study in senior community centres, states that "Men who have had more power in earlier years may expect to have the same level of power when they are older, but find themselves outnumbered by women and/or in positions where power is not legitimate." Further,

NIACE (2002: 4) states, “The number of older women learning far outweighs the number of older men. Gender specific strategies need to be employed to reach older men.”

Williamson (2000: 63), who focused on gender difference, found that courses offered by U3A “sometimes reflect the interests of the female membership which leads some critics to suggest that offering courses suited to men’s interests might attract more of them to join”. The same sentiment is expressed by Scott and Wenger (1995: 162, as cited in Williamson, 2000), who stated, “Older men sometimes don’t wish to become involved with old people’s organisations they perceive to be dominated by women”.

Davenport (1986, as cited in Truluck and Courtenay, 1999: 225) is among those who focused on the particular characteristics of men and women that influence their preferred learning styles. Davenport found, for example, that older women tend to be particularly sensitive to and interested in human behaviour, as well as subtleties in their environment. Because of their interest in social interaction, women prefer to engage in interactive discussions rather than to listen to lectures without the opportunity for discussion. Older men, by contrast, prefer lectures, and more independent (and often solitary) learning methods, such as audiotapes or reading materials, from which they can select the information they can use and with which they can proceed at their own pace. These findings suggest that gender specific strategies may need to be employed in order to reach older men.

1.1.1.2 Implications of Weak Male Participation

There are specific problems with U3A’s lack of participation by men. Their absence weakens the quality of learning opportunities that might otherwise be provided. One consistent problem experienced by many U3As is that of obtaining tutors. Hurworth and Harvey (2001: iii) state in their survey that obtaining tutors was commonly said to be difficult and a major impediment in organisation’s ability to schedule courses/classes. McDonnell (1998: 12) also refers to this as a problem. Since men have until quite

recently dominated many fields of employment and knowledge, their absence from the ranks of U3A tutors considerably narrows the range and breadth of available offerings.

Tutors are U3A members. Laslett (1996: 228) points out: “Those who teach shall also learn and those who learn shall also teach.” Members who are wiling to teach are therefore very important to the survival of U3As. A short survey of the newsletters of three U3As in Victoria in 2003 revealed that 47 percent of tutors were males, while males only accounted for 24 percent of the membership. The committee membership of the same U3As revealed that half of the committee members were males, and all treasurers were males. It appears as if males play an important role in the management of U3As, yet a lack of male membership could weaken the quality of U3As.

Hurworth and Harvey (2001: 1, 27) also found that the tutors of academic courses are “retired university lecturers or school teachers”. One would expect that among the present cohort of U3A members, more men than women would have been university lecturers or teachers. The lack of male participation in U3As adds to the problem of obtaining tutors in certain subjects.

Whatever the cost to the U3A programme, the absence of men also represents a loss to men themselves. By avoiding formal learning activities men may miss out on the benefits that such activities can provide: improved health, the simple joy of learning, motivation, self-assurance, and companionship. Learning also provides specific survival skills to stay up to date with current technology. There is evidence that women’s generally better health in the third age may be influenced by their greater willingness to pursue learning opportunities.

Anstey, Luszcz and Andrews (2002) found strong differences in the relationship between psychosocial well-being and mortality between men and women. In their study, women who reported high levels of morale and strong perceptions of control over their lives lived longer, despite deficits in health and physical functioning. In contrast, for the men in the study the effects of poor health and losses of function influenced their levels of morale

and perceptions of control so that health effects predominated, and appeared to lead to shorter lives.

1.2 PROBLEM FORMULATION

In light of the need for the provision of lifelong education for older adults described in the previous sections, the following research question is posed: *What is the contribution of the University of the Third Age to lifelong learning for older adults?*

In seeking answers to the above research question, the following sub-problems need to be addressed:

i) What educational models are available to older adults, and what barriers prevent older adults from participating in lifelong education? What are the causes of the gender imbalance that is a common feature of such programmes, with special reference to the educational needs of older men?

ii) What are the views of a sample of U3A members and presidents of U3A branches in Victoria, Australia, about the contribution of the organization to lifelong learning for adults?

iii) What recommendations can be made, based on these findings, to improve the educational provision of U3A and encourage the participation of older adults, especially men, in its programmes in Australia?

1.3 AIMS OF RESEARCH

This study aims to investigate the contribution of the University of the Third Age to lifelong learning for older adults in Victoria, Australia. This broad aim includes the following objectives:

i) To describe the educational models available to older adults, and the barriers which prevent older adults from participating in lifelong education, and to determine the causes of the gender imbalance that is a common feature of such programmes, with special reference to the educational needs of older men.

ii) To investigate the views of a sample of U3A members and the presidents of U3A branches in Victoria, Australia and to determine how views of them differ by means of an empirical investigation.

iii) To make recommendations based on this study in order to improve the educational provision of U3A, and encourage the participation of older adults, especially men, in its programmes in Australia.

I will clarify and describe the need for lifelong learning as part of successful ageing and identify the most important barriers to participation and the consequences to individuals and society of failing to provide learning opportunities to the older adult population.

1.4 METHODOLOGY

The investigation includes a review of the literature related to the reasons for the lifelong learning of older adults, the educational models available and the barriers to participation. The research also includes an empirical investigation, using a quantitative approach. This research project is designed as an exploratory study and, as such, employs survey methodology in order to explore the participation of older adults in U3As in Victoria, Australia. Surveys are gender mixed and participants are surveyed using anonymous

questionnaires. In addition, the chief executives (presidents) of the U3As in Victoria were surveyed using a different instrument.

1.4.1 Population and Sampling

Currently, the state of Victoria has 64 U3As with about 17 258 members (U3A Network Victoria, 2004). The survey was provided to all enrolled members in two of the organisations, which have a combined total of about 900 members. The participation of many of the U3A members in these two organisations was secured with the help of the presidents of the organisations, who were asked to include an announcement of the study in their respective participant bulletins.

In addition, the presidents of the 68 Victorian U3As were surveyed. Their participation was solicited by mail.

1.4.2 Data Gathering

Data for the study were collected in two phases through questionnaires. The data collection phase was carefully planned, including a pilot testing of instruments, the type of accompanying letters to members and presidents and procedures for the distribution of the questionnaires.

1.4.2.1 Questionnaires

There were two separate questionnaires: for the U3A members and the presidents of the U3A management committees.

The member questionnaire covered a comprehensive set of domains, including demography, previous formal education, courses enrolled in and barriers to participation. The U3A president questionnaire sought information about the gender distribution of members, committee members, tutors, and treasurers of the organisation. In addition to

information about the courses offered, the questionnaire asked if problems existed in attracting members, tutors, financial support and the occurrence of accommodation problems.

Both questionnaires were pilot tested.

1.4.3 Analysis

Responses to the questionnaires were analysed using the SPSS (Statistical Package for the Social Sciences) as explained by Pallant (2001). Responses were grouped and counted according to demographic/independent variables. Chi square tests of independence were used to test for significant relationships between independent and dependent variables of a categorical nature. T-tests and ANOVA were used to compare continuous and categorical variables.

The findings of the member questionnaires and presidents' survey were presented in tables and narrative form.

1.5 CLARIFICATION OF CONCEPTS

The following key concepts are clarified as used in the thesis.

University of the Third Age (U3A)

> Independent incorporated associations providing educational programmes for older adults. (U3A Network Victoria, 2004)

Member of a U3A

> An older adult enrolled at a University of the Third Age. Members pay an annual membership fee that entitles them to attend as many classes as they wish, subject to limitations on class sizes (U3A Network Victoria, 2004). At the creation of the U3A in 1981 it was decided, as stated by Laslett (1996: 220), "there are no staff and no students, only members".

U3A Network Victoria Inc.

> "An incorporated association. The U3A Network Victoria Inc. was established in 1988. Its members are U3A associations in the state, rather than individuals" (U3A Network Victoria, 2004).

Tutor

> A U3A member who teaches at a U3A on a voluntary basis. The majority of tutors are U3A members.

Committee of Management

> The group of U3A members who are elected annually by the members of the U3A to serve on the management committee. They are the "administrators" of the U3A. As stated by The U3A Network – Victoria (2004), "All the organisational work is done by voluntary committees and no-one is paid."

President:

> The chair of a U3A, elected annually by the membership; an honorary rather than executive office.

Treasurer

> An elected member of the Committee of Management of a U3A who is responsible for the financial matters of U3A.

TAFE

> Colleges of Technical and Further Education. "The Australian college system is based on vocational education programmes that can be used for employment or for further academic study" (Australian Colleges TAFE, 2005).

AIUTA

> The International Association of Universities of the Third Age. Most of the European U3As are "loosely linked through the Association International of Universities of the Third Age (AIUTA)" (Dale, 2001: 783).

1.6 ASSUMPTIONS AND LIMITATIONS OF THE STUDY

The initial pool of U3A participants and U3A presidents from which the actual samples were drawn is deliberately large, since it was assumed that a number of participants

would not wish to be involved in the study, or would not return their questionnaires by mail. It was hoped that a large enough total from each group would agree to participate so that the results would be representative.

The results of the study are not likely to be generalisable to older adults in general, nor to adult members or presidents of other U3As in Australia. However, the study was designed to be exploratory in nature, so that it was hoped that the results would be suggestive of future research directions.

1.7 CHAPTER DIVISION

Chapter 1: Introduction – This contains the background and statement of the problem, the purpose of the study, the research questions, and the summary of the study.

Chapter 2: Literature Study – This outlines supportive research for lifelong learning as part of successful aging. It provides a brief history of the movement towards education for the elderly. This section will also incorporate a discussion of various educational models for older adults. It examines the necessary conditions to promote interest in further formal education among older adults and the barriers to participation in existing programmes.

Chapter 3: Research Design – This thesis will make use of four kinds of data: demographic data from the Australian Bureau of Statistics; membership data from Australian U3A programmes; survey data from a sample of U3A current members and from presidents (chairpersons) of U3A management committees. It will provide a description of the data collection instruments I plan to use, along with the methods of sampling and analysis that will be applied.

Chapter 4. Findings – This illustrates the findings of the study, and describes the statistical tests for frequency, correlation, significance and regression analysis.

Chapter 5: Conclusion and Summary – This chapter will summarise the findings of the research and analyse what the findings suggest about the role of U3A programmes in the provision of educational services to older adults. I will present conclusions supported by the data about reasons for and barriers to participation in these programmes, and include recommendations to make the U3A programmes more accessible, satisfying, and effective for the population they are meant to serve. It will give recommendations for further research.

CHAPTER 2: LIFELONG LEARNING AND THE NEEDS OF THE OLDER ADULT

2. INTRODUCTION

The purpose of this chapter is to synthesise and analyse literature pertinent to the purpose of this research: to explore the learning needs of the older population and to evaluate the role of the U3A in the provision of lifelong education.

Population aging and the subsequent increase in life expectancy have, over the past two decades, shaped the national and international discourse. Most see longevity in terms of problems with the focus directed at dependence, health and social services. The emphasis should be on well-being and positive engagement in community activities.

This review of the literature proceeded by looking at all of the various social science research, and found that perspective to be a highly significant element. There is a distinct difference between the work of those who see aging as essentially about its losses, and those who see the process in terms of its gains. Purdie and Boulton-Lewis (2003: 130–131), among others, have observed that the 'loss' view of aging predominates (Dixon, 2000, as cited in Purdie and Boulton-Lewis, 2003: 130). This fundamental difference in perspective can be detected in the research conducted by psychologists, sociologists, and educators, influencing their research approaches, their choice of research subjects, their assumptions, and their results. As background to this dichotomy in views of aging is a growing concern about agism, or the stereotyping of older people, which appears in the academic as well as the popular media.

Andrews (1999: 2) believes that "population and individual aging represent a great triumph of humanity over the forces of mortality particularly in this last half century. Yet older persons are still often perceived as 'pensioners and patients'."

As stated in the previous chapter, there is little agreement about the meaning of 'old' as applied to people, with no clear definition of the terms in use. In this review the term

older adult(s) is used, to distinguish this group from those engaged in career building, child rearing, home making, and other adult tasks usually associated with the middle years of the life span.

While the Australian U3A has no centralised structure and terminology, Swindel (2002: 419) maintains that for U3As, instead of a chronological age requirement for admission, the *third age* is defined as "a stage in life when individuals are no longer tied to the responsibilities of regular employment and/or raising a family."

Williamson (2000: 50) prefers Laslett's description of the four ages to a life span, defined neither chronologically nor biologically. In the First Age, individuals prepare for adult life through socialisation, schooling, and dependence on others. The Second Age is characterised by work, home making, intimate relationships, and child rearing. Leaving the work force and having the freedom from domestic responsibilities to pursue personal goals and interests is characteristic of the Third Age. The Fourth Age is characterised by "dependence and decrepitude leading to death" (Laslett, 1989, as cited in Williamson, 2000: 50).

Grabinski (1998) cites the generational and chronological structure proposed by Strauss and Howe (1991, as cited in Grabinski, 1998: 73–74), which includes *youth* (age 0 to 21), *rising adulthood* (age 22 to 43), *midlife* (age 44 to 65), and *elderhood* (age 66–87). Strauss and Howe also describe each of these generations as having a *peer personality*, "a generational persona recognised and determined by (1) common age location; (2) common beliefs and behaviour; and (3) perceived membership in a common generation" (Grabinski, 1998: 74). These authors have also given the generations labels, which have since been popularised: *silents*, those born between 1925 and 1942; *boomers*, born 1943–1960; *thirteeners*, born 1961–1981; and *millenials*, born 1982–2008. Because the so-called *silents* are now reaching *elderhood*, it is this group that is of particular interest to the current research.

The silent generation in America grew up during the Depression and World War II, were civil rights activists, and major contributors to the helping professions (teaching, medicine, ministry, and government). Strauss and Howe (1991, as cited in Grabinski, 1998: 76) provide a detailed description of this cohort, some of which is relevant to their participation in education in later life: "confused about their purpose and feeling vaguely dissatisfied with jobs, families, and self, they are snapping up early retirement incentives – often without a clue about what comes next". They are also strong communicators and negotiators, willing volunteers, and are focused on process over product. It is not within the scope of this review to explore these generational definitions in detail, nor is the current research concerned with labelling older adults in this way. However, as the review below shows, certain generational and cohort-related factors do appear to influence older adults' motivation and participation in education.

2.1 LIFELONG LEARNING

Education for older adults and lifelong learning are frequent topics in the literature, but they are relatively recent fields of study, so there is no consistency in how these terms are used. Lifelong learning apparently means one thing to educators and another to government policy makers. Among educators, the term refers to processes occurring across the life span as individuals grow and develop; policy makers see it as one means of fine-tuning the skills of the work force to keep up with rapidly advancing technology. The editors of *The International Journal of Lifelong Education* contend that those with the vocational perspective have co-opted the concept of lifelong education and learning (Editorial, 2002: ¶2). Gaskell (1999: 273), too, urges policy makers and educators to "move beyond [the] narrow vision of lifelong learning" as "an instrumental rationale quite largely concerned with maintaining a skilled work force" (also Brown, 2001: 31–33). It has been part of government policy in the UK since 1993 (Jones and Symon, 2001: 269–270).

In Western Europe and the UK, lifelong learning, or lifelong education, has become embedded in broad economic and political programmes designed by governments to

adjust to rapidly changing social and economic conditions that "require competencies and flexibility . . . that can no longer be acquired at the speed and in institutionalised forms of 'traditional' education and training" (Alheit and Dausien, 2002, Introduction: ¶8), and has thus become a means of educational reform.

While such current issues as the changing nature of work, the new ascendancy of 'knowledge' as the principal product of post-industrial societies, and the apparent failure of existing educational systems are all major factors in the world-wide attention paid to lifelong learning, this perspective is outside the scope of the current research. More to the point is the perspective of the individual learner across the life span. Alheit and Dausien (2002) offer a theoretical perspective termed *biographical learning*, a phenomenological concept of learning that originates in the life history of the individual learner (Perspective II: ¶1). These authors prefer the term, *lifewide learning*, to emphasise the phenomenon of learning taking place across the entire life span.

"The term 'lifelong learning' has been coined to describe a relatively new trend of seeking education throughout one's lifetime" (Kressley and Huebschmann, 2002: 839). Alternatively, the National Center for Education Statistics, US (2000: 4) defines it: "At its broadest and most theoretical level, lifelong learning refers to a process or system through which individuals are able and willing to learn at all stages of life, from preschool years through to old age."

There have, however, been much earlier attempts to address lifelong learning. Leigh (1930: 123, as cited in Cross, 1981: 255) describes it: "There is gradually emerging . . . a conception of education as a lifelong process beginning at birth and ending only with death, a process related to all points of the life experiences of the individual, a process full of meaning and reality to the learner, a process in which the student is active participant rather than passive recipient."

Kressley and Huebschmann (2002: 835) maintain, “Gerontologists have long recognised the importance of continued education for the elderly. Educational institutions, on the other hand, have maintained their focus on service to the younger generation.”

Jones and Symon (2001: 274) characterise lifelong learning as *serious leisure*, and include in its potential benefits a way of structuring time and activity, fostering social contacts based on common interest and experience, setting and achieving goals, and supporting a social identity or status, all of which have been associated with successful aging. These benefits may be especially important for those retired from paid work, but the benefits of lifelong learning may also accrue to those employed in unsatisfying occupations. There are also a number of personal benefits to simply engaging in lifelong learning: self-actualisation and self-expression, following a path comprised of specific goals, and a quest for excitement for those in dull jobs or in retirement. Individuals with dissatisfying jobs may be able to use serious leisure as compensation, if they choose activities that have personal meaning for them and that offer them a chance to invest themselves fully.

The term, third age, as applied to education appears to have originated in France in 1973, when the University of Toulouse offered summer programmes for retired adults, referring to the programme as a *université du troisième age* (Glendenning, 2001: 63). In this context, it refers to those who have finished working and are pursuing additional formal education, and will be discussed in a later section of this literature review.

In the UK, the Open University, founded in 1969, has since become a model of distance learning (Johnson, 1995: 419). It is open in the sense that there are no academic admission requirements and that students work independently. Independent learning is supported by meetings with tutors and other students taking the same courses. Older Open University students appear to prefer courses in the arts and social sciences, which Glendenning (2001) suggests is a possible reflection of their longer perspective on life, a notion that recurs in the literature, as discussed below.

In the area of education for older adults, another term has come to predominate. The term, *educational gerontology*, was made official in the UK in 1985 with the formation of the Association for Educational Gerontology, but it had been used in both the US and the UK in the early 1970s. The journal, *Educational Gerontology*, was launched in the US in 1976 (Glendenning, 2001: 64). As defined by Peterson, educational gerontology is the study and practice of instructional endeavours for and about aged and aging individuals. It can be viewed as having three distinct though related aspects: (1) educational endeavours for persons who are middle-aged and over; (2) educational endeavours for a general or specific public about aging and older people; and (3) educational preparation of persons who are working or intend to be employed in serving older people in professional to para-professional capacities (Peterson 1976: 62, as quoted in Lemieux and Martinez, 2000: 483).

In the 1980s, Glendenning refined the model by adding the concept of self-training to Peterson's foundation, and using the term *gerontological education* to describe the teaching of gerontology. Lemieux and Martinez (2000: 489) have recently proposed a new theoretical model and yet another term, *gerontagogy*, to describe a *competential* model of continuing education for older adults. The model is described as competential because it comprises education that is designed to improve the physical, psychological, and social well-being of older students. The theoretical basis is that of psychological self-actualisation; that is, "reactualising knowledge already acquired" (Lemieux and Martinez, 2000: 489), again referring to the life span perspective. This applies to gerontological programmes designed for the elderly, but Lemieux and Martinez propose that gerontagogy also includes educational programmes designed for *teachers* of the elderly. It is not within the scope of the current research to expand on what is essentially an academic argument over terminology and interdisciplinary discourse, but the fact that such an argument is taking place strongly suggests that education for older adults is about more than courses in line dancing, playing bridge, or appreciating opera, and is therefore of interest here.

Alheit and Dausien (2002: 11) offer a theoretical basis for understanding the knowledge that has been accumulated by older adults as the foundation for any further education they may undertake. In their view, individuals engage in learning from birth – implicitly, through interactions with others, and explicitly through institutionalised schooling. Through these processes, individuals accumulate knowledge that is the sum of their life's experiences. This knowledge is acquired by the individual's interactions and is essentially socially determined.

As Brown (2001: 32) has observed, "Today it makes no sense to think of only third age learning because fourth age learning is with us," thus suggesting that educators take note of the different learning needs of those in their 50s, 60s, 70s, 80s, and older. Neikrug et al. (1995: 346) are among those researchers who have attempted to distinguish the young-old from the old-old; as their numbers increase, so does researchers' interest in this group. Neikrug et al. (1995) were also interested in investigating the stereotyped image of the elderly as economically disadvantaged, in poor health, and dependent on others, by focusing on the quality of life of the old-old who had none of these characteristics.

The study conducted by Neikrug et al. (1995: 350–351) drew its sample from individuals aged 81 to 91 who were enrolled in a university-based lifelong learning programme, and attempted to explore elements of their life style, including their use of coping and adaptation strategies. Nearly 70 percent of the people in the sample identified themselves as in "good" or "fairly good" health, a finding of other studies, and worth noting for its suggestion that the subjective perception of health as experienced by the elderly themselves is more significant than the objective assessment of their caregivers and younger people. In this particular sample, intellectual activity was the most important factor in their life style; all had been enrolled in university-level educational programmes within the previous two years, nearly 77 percent read books "regularly", and nearly 75 percent attended dramatic or musical events "regularly" (Neikrug et al., 1995: 350–351). In addition to a subjective perception of health, one finds a subjective perception of old among the participants in this study.

Gaskell (1999: 265) is among those who have pointed out that adult education, as it is traditionally designed, tends to pattern itself after the familiar model of the knowledgeable (adult) teacher and the ignorant (child) learner. This may be one of the reasons for the growing popularity of the democratic University of the Third Age (U3A) model, for other self-help models, and for independent learning programmes in which teachers and students are peers (Gaskell, 1999: 268).

When searches the Internet using the key words: education and aged or aging, most references relate to teaching older adults about changes in their physical health and most articles appear in medical, nursing, social work, and psychological journals. The general thrust of these articles is that older adults must be taught to adjust to aging, in a general reflection of the loss perspective of aging. However, there is a growing body of literature on the cognitive and psychosocial aspects of aging. It is possible to detect in the more recent literature a growing interest in what factors, besides physical health, influence older people's sense of how old they are.

Smith (1998: 1) observed that it is only recently that educational psychologists have devoted attention to older adults. The reason for this has mainly been the large number of adults who are now pursuing continuing education. Adults are living longer and healthier lives, they retire earlier, and have greater leisure time. All this has sent adults 'back to school', not just in formal settings but also in a variety of alternatives.

While the focus of the current research is on education for older adults, it has been necessary to look specifically at what motivates older adults to seek education in their later years, the educational models that appear to attract them, and the barriers they face in attempting to access educational programmes. In an effort to understand adults' participation, a range of related conceptual and empirical work has been reviewed, particularly dealing with adult development, social relationships, and psychological factors such as well-being. In addition, the work of those who have adopted a life course or life span perspective receives specific attention here, because this approach puts

education in a wider perspective, and because writers with this approach tend to avoid a focus on the loss concept of later life.

2.1.1 Successful Aging

So-called successful aging is an increasingly frequently found topic in both the popular media and the academic literature. Here, again, a difference in perspective is apparent. For some researchers, aging successfully is associated with avoiding poor health and functional disabilities, and promoting high levels of involvement with social relationships and cognitively stimulating activities (Anstey, Luszcz, and Andrews, 2002: 74; Vaillant, 2002: 14–16, 61).

Frazier, Hooker, Johnson and Kaus (2000: 242), from the other perspective, see aging as an adaptation process, and successful aging as the processes involved in adapting to all of life's changes, the biological, physical, cognitive, emotional, and social. Pinquart (2002b: 90) is among those who regard psychological health as a crucial aspect of successful aging, in his concern with older people's perception of themselves and their well-being. Kolland (1993: 538), among others, has observed that individuals age differently, depending on how they have developed across the life span, their social and family backgrounds, roles, and relationships, and their unique biology. Pinquart (2002a: 92) believes that chronological age does not cause individuals to change their sense of purpose in old age, but rather that it represents or reflects their sense of loss or decline.

Andrews, Clark, and Luszcz (2002: 761–762) applied the so-called MacArthur model of successful aging to data from the Australian Longitudinal Study of Aging, a long-term population-based study of a cohort of individuals aged 70 and over. The MacArthur model classifies participants in terms of physical and cognitive functioning in the areas of degree of overall cognitive impairment, memory, ability in seven activities of daily living, physical performance, balance, and sitting/standing ability. Overall, Andrews, et al. (2002) found that younger, better-educated, financially secure males aged more successfully than any other demographic group.

Ryff (1989) included six successful aging criteria: positive social relationships, "a sense of purpose, autonomy, self-acceptance, personal growth, and environmental fit" (as cited in Fisher and Specht, 1999: Introduction, ¶5). This latter criterion describes how well an individual's living environment meets the individual's needs for resources within that environment (Fisher and Specht, 1999: The Respondents' View, ¶30).

Education goes far beyond the acquisition of basic knowledge and professional skills. It is an essential contribution to a conscious design for living. In light of this, constant learning in its widest sense is essential in old age. According to Seiffert (2002: 9), "Education in old age helps older people to remain integrated in society and to form their own social environment. It develops mental and spiritual strength, and thus has a preventive effect." Lim (1988), in discussing the Life-long Learning Centre in Singapore, stresses the importance of providing appropriate continuing education opportunities for older people to sustain their self-esteem and promote successful aging. Withnall (in Glendenning 2000: 89) specifies, "The purpose of educational activity in later life is to provide solutions to the problem of how to achieve 'successful aging'."

2.1.2 Adult Development

This section of the review encompasses primarily theoretical and conceptual work that has been published on those aspects of adult development most closely related to the participation of older adults in educational programmes. In addition, work is reviewed that focuses on older adults' perceptions of themselves as they are and as they see themselves in the past and in the future, in an attempt to include those aspects of the life span perspective that are relevant to education in later life.

Within the conceptual framework of the life course or life span perspective, the later years are given meaning, in part, by the experiences of the earlier years, so that a life course can be understood in terms of both social change and individual change. The periods of greatest influence, in this view, are the role transitions that occur over the

course of a lifetime, as individuals enter and leave these roles, as children, wives and husbands, mothers and fathers, grandparents, workers, and so on (Jamieson et al., 1998: 216).

Baltes, Staudinger, and Lindenberger (1999: 471) provide a useful review of the theoretical and empirical work that had been done in the previous decade on *lifespan psychology*, which serves as a conceptual framework for the current research. Lifespan psychology assumes that development continues across the entire life span through various processes of adaptation. Baltes, Staudinger, and Lindenberger (1999: 485) focus on one theory particularly, *selective optimisation with compensation*, because it applies logically throughout the life span. Essentially, this theory proposes that the processes involved in maximising gains and minimising losses occur together throughout life. One's position in life and cultural and personal factors determine what is perceived as a gain and what is perceived as a loss, as well as how gains and losses interact for individuals. Thus, as individuals age, they engage in *selection* (choosing goals), *optimisation* (choosing the means to achieve goals), and *compensation* (choosing alternative strategies) (Baltes et al., 1999: 482). The example offered by Baltes et al. (1999: 483–484) to illustrate the theory is worth reproducing here for it is appropriate to the subject of late life creativity and learning:

> When the concert pianist Arthur Rubinstein, as an 80-year-old, was asked in a television interview how he managed to maintain such a high level of expert piano playing, he hinted at the coordination of three strategies. First, he played fewer pieces (selection); he practiced these pieces more often (optimisation); and to counteract his loss in mechanical speed he now used a kind of impression management, such as playing more slowly before fast segments to make the latter appear faster (compensation).

Of interest to the current research is the application of selective optimisation with compensation theory to intellectual development and, particularly, cognition. From their review of the relevant research, Baltes et al. (1999) concluded that older adults could demonstrate considerable gains from education, both through guided training and self-

directed practice, primarily because of the perspective that the depth and breadth of their life experience gives them.

Ryff and Heidrich (1997: 204) explored perceptions of the future in young, middle-aged, and older adults based on their subjective assessments of their own progress and decline across various aspects of their life span. Of particular interest to the current research is their investigation of current perceptions of well-being and future predictions. Perhaps not surprisingly, the authors found that the older adults in their study, with a mean age of 73.4 years, had expectations of decline rather than progress in the future, at least compared with the perceptions of young and middle-aged adults. Still, fully a third of the healthy, financially stable, and well-educated group of older adults in the sample anticipated that their sense of well-being would improve. Ryff and Heidrich (1997) found that when older adults perceived that they were in control of their environments, they were continuing to experience personal growth, and that their lives had meaning and purpose; the strongest predictor of these perceptions was a high level of meaningful activity.

2.1.3 Purpose in Life

The work on purpose in life is reviewed here because it has been associated with the motivation to participate in education in later life, and because of its relationship with self-esteem and self-confidence, both of which are part of this motivation. Purpose in life has been defined as “having goals in life and a sense of directedness, feeling that there is meaning to present and past life, holding a belief that gives life purpose, and having aims and objectives for living” (Ryff, 1989, as cited in Pinquart, 2002a: 90). The factors that influence the sense that one has purpose in life, particularly in older adults, include health and competence, social relationships, the freedom to pursue meaningful activities after retirement, socio-economic status, gender, and personality. Ryff and Singer considered purpose in life to be “a defining feature of positive mental health” (Ryff and Singer, 1998, as cited in Pinquart, 2002a: 95).

Pinquart (2002a) reviewed a number of studies to see whether purpose in life had been associated by researchers with enhanced well-being and the absence of depressive symptoms in older adults. Pinquart's (2002a: 90) meta-analysis looked at 70 studies that linked purpose in life to a wide range of variables, including chronological age, physical health, mental and functional competence, marital status, social relationships, retirement status, socio-economic status, gender, subjective well-being, and depression. Overall, Pinquart found that a higher degree of purpose in life was related to better physical health, functioning, social relationships, being married, working rather than retired, and better socio-economic status. In addition, purpose in life was strongly correlated with the perception of well-being. While Pinquart (2002a: 104) did find a clear decline in purpose in life with advancing age, he noted that it was a relatively small decline, and observed that even in old age, purpose in life was strongly maintained by a number of individuals.

Pinquart (2002a: 103) expected to find that the quality of social contacts of all types among older adults would be strongly associated with purpose in life, but he was somewhat surprised to find that frequent contact with family members was a stronger predictor than contact with friends. He suggested that family relationships supported the perception among older adults that they were useful to family members in a way that they were not able to be with friends, which gave the family relationships more meaning.

The difference in perceived well-being and purpose in life between employed and retired adults also surprised Pinquart (2002a: 104), because it was not as strong as expected. One interpretation Pinquart offered is that retired adults are able to compensate for losing their work roles by becoming actively involved with other social roles. For some, the work role may have been less important than others, especially family roles, so that retirement brings older adults the freedom to devote more time to their roles as family member or friend – roles they may value more highly and that may have more meaning for them.

With regard to the relationships between purpose in life and perceived well-being, Pinquart (2002a: 104) found that feeling useful, being involved in activities that had real meaning, and being able to reflect back on 'a meaningful life' were the principal sources

of well-being among older adults. In turn, a feeling of well-being tended to raise their level of aspiration and encourage them to set future goals, both of which gave a sense of purpose to their lives. Pinquart concluded that purpose in life could be maintained in later life through involvement in meaningful social networks and a variety of purposeful activities. As is discussed below, in connection with the motivation of older adults to participate in education, a sense of purpose, and its attendant perception of well-being, plays a significant role in that motivation.

Much of the research on aging successfully and perceptions of well-being in old age is based on *continuity theory*, as articulated by Atchley (1983; 1999 cited in Lysack and Seipke, 2002: 130). According to this theory, many "older adults show considerable consistency over time in their patterns of thinking, activity profiles, living arrangements and social relationships, despite significant changes in health, physical independence, and social circumstances," as "a direct result of 'selective investments of time and energy'" (Lysack and Seipke, 2002: 130). Those who believe that identity is shaped by what people do and how they do it subscribe to continuity theory. Christiansen, for example, has observed that when individuals create their identities through involvement in meaningful activities, they provide themselves "with the contexts necessary for creating meaningful lives, and life meaning helps us to be well" (2000, as quoted in Lysack and Seipke, 2002: 131).

Carlton and Soulsby (1999: 1) maintain that growing older can produce a feeling of exclusion from work and society, and as result of that people can lose a sense of purpose. They say that if people have become marginalised, "the lack of opportunity to learn new things compounds their disadvantages in dealing with a changing world". For that reason, Carlton and Soulsby (1999: 1) believe that we have to acknowledge "the power of learning" and make education available especially for older people as it "can lead to new directions for their personal development" and help them to sustain active and independent lives.

Ardelt (2000) presents a convincing argument for the cultivation of wisdom rather than the accumulation of what she calls “intellectual knowledge” as a means to successful aging. In essence, she is arguing for an older adult education curriculum that is significantly different from those designed for children and younger adults. While there is a need for specific survival skills to enable older adults to stay current with technology and other innovations so that they are not marginalised by the wider society, and to learn the skills and information that will support their independence and help them cope with matters affecting their finances, health, and relationships, Ardelt believes that there is an equally strong need for older adults to have the opportunity to learn reflection, to contemplate the meaning of life, to deal with their life histories, and to seek “self-fulfilment and spiritual advancement” (Ardelt, 2000: 772).

Ardelt (2000: 773) quotes Moody (1986: 135) effectively on the subject of knowledge versus wisdom:

> Acquiring more and more information is not the same thing as the cultivation of wisdom. The solution may not necessarily be to “plug in” the elderly to a new information utility. Instead of being a time to assimilate more and more information, old age may be the period of life to go in the opposite direction: to reduce the quantity and complexity of information in favour of what is deeper and more essential. Instead of encouraging elders to become more adept information junkies, we should encourage a complementary style of late life learning based on the strengths of age and experience.

Ardelt (2000: 785) believes that it is unfortunate that many lifelong learning programmes offer older adults “intellectual rather than wisdom-related knowledge”. The programmes that would promote wisdom-related knowledge may “offer people the opportunity for autobiography work and life review to make sense of their lives and to come to terms with the past”, encouraging reflection, which helps reduce self-centeredness. The liberal arts and humanities courses so popular among older learners do provide them with new information, but such studies also encourage “personal development, an increased appreciation of others, other cultures, history, and of the self, and an expansion of their

self-concept," so as "to place their lives in the larger frame of the human culture" (Ardelt, 2000: 786).

2.1.4 Motivation and Participation in Education in Later Life

Although a number of relatively superficial studies have been carried out on what motivates older adults to participate in formal or informal education, there have been few rigorous attempts to study the subject. The most serious attempts have been multidisciplinary, looking at lifelong patterns of participation in education, and at cohort effects on interest in learning in later life. As noted previously, the field is currently in a transitional stage, so that the period of life after retirement from paid work or after family responsibilities have been fulfilled is still regarded by many as a time of leisure. As a result, some of the relevant work has been undertaken in order to understand what older adults do with their leisure time and why they make the choices they make. A related area of research concerns older adults' preferences for formal or informal learning experiences in later life, which is in turn associated with lifelong patterns and cohort effects.

Gorard, Rees, and Fevre (1999b: 2) focused on patterns or *trajectories* of participation in education and training across the lifespan, using cohorts defined by chronological age. The initial assumption was that educational trajectories would be determined by individuals' earliest experiences in school, and by certain family characteristics. The authors also assumed that relatively stable *learner identities* formed early in life would be shown to carry through into later life. Using data representing 100 years of experience in industrial South Wales, with a focus on the socio-economic factors that predict participation in education in later life, Gorard et al. (1999b: 1) found that socio-economic background was the predominant determinant of educational trajectories.

In a related study, the same research group focused on the influence of family members' educational trajectories across the life span (Gorard et al., 1999a: 517). Using the same data as the study discussed above, Gorard et al. were able to trace learning trajectories across three generations in a specific region that has undergone major economic and

social changes over 100 years. Over this period, among other changes, opportunities for education beyond compulsory school increased, as did people's expectations that more formal education would be undertaken, although not everyone met the expectations (of their parents and employers) or took advantage of expanding opportunities.

The work of Gorard et al. is significant in the context of the current research for a number of reasons. First, it establishes that family socio-economic characteristics, cultural norms, and regional socio-economic and political profiles can strongly influence participation in education by older adults. Second, the work emphasises the role that families and cultures play in expectations and social role definitions in later life, both of which can influence an individual's decision to seek later life education (Gorard et al., 1999b: 517). Finally, although an aging population is seen as a global trend, and some researchers have attempted to treat later life education as global, it is well to remember that regional, national, and cultural differences continue to shape the opportunities available to older adults for educational experiences, and their willingness to participate in these experiences.

As noted earlier, a few authors have studied the educational expectations of cohorts or generations that have been defined not only by their personal histories, but by social, political, economic, and cultural changes and events that have occurred during their lifetimes. The 'silent generation', as characterised by Strauss and Howe (1991, as cited in Grabinski, 1998: 73) and referred to earlier in this review, is, for example, well-educated, actively interested in continuing professional advancement, and is the generation that has led the movement in the US toward professionalising various occupations, through the development and implementation of standards for certifying, licensing, and accrediting individuals and institutions (Grabinski, 1998: 75). This is the generation that prefers formal or highly structured educational experiences, and its members are likely to commit to technology-based opportunities such as distance learning; they are also interested in travel, in broadening their experience, and in education that supports their volunteer activities (Grabinski, 1998: 76).

Gaskell (1999), writing in the overall context of the education system in the UK, observed that a cohort's persona, formed by common experiences in early schooling, has more to do with the motivation to seek education in later life than the mere habit of schooling. Gaskell cites a survey conducted in Glasgow, Scotland, showing that adults associated education with boredom, and learning with enjoyment and personal growth (Young, 1999, as cited in Gaskell, 1999: 261).

As already observed, the preference for formal versus informal educational experiences may be related to lifelong patterns of education and training, and to cohort characteristics. The literature includes a few studies of this preference, although the researchers' choice of setting may have been guided more by convenience than any desire to study a university-based versus a community-based population. Most studies have been conducted in university-based or university-sponsored programmes.

Jones (2000: 341) thinks that colleges and universities have been seriously underestimating the interest of older adults in studying for a degree or certification. He points out that when U3A first started in the UK, older people attending any kind of university simply for the pleasure of learning "was such a novelty that study for the sake of achievement and of identifiable qualification was not at all favoured" (Jones 2000: 339). Jones argues, however, that now that the UK's Open University is well established, the idea is no longer novel. Further, he sees an upcoming generation of university graduates who will want to continue exploring their academic interests that have been further broadened by work experience, and of others who will want to seek credentials in an entirely different field. He also believes that those who left school in adolescence to work who could have done well at university, and those who never considered university study earlier in life and lack confidence in their ability to succeed at it, are also potential university students in later life. These findings are confirmed by Scala (1996: 765), whose study included highly educated individuals: 37 percent of the sample had completed college or graduate work. Nearly 14 percent of the participants reported that their motive for enrolling in college was that they had "always wanted to" (Scala, 1996: 754).

Jones (2000: 345) observed that the appeal of formal education to the retiree is related to what many miss about working: a sense of achievement, a daily structure, creative challenge, and social interaction with young people. Scala (1996) also found that interaction with younger students was a motive for enrolling in college, reported by more than 35 percent of the participants in her study.

In an early study of the participants in Australia's U3As, Swindell found that individuals could be classified either by their motivation to acquire knowledge in specific subjects, to be mentally stimulated, to search for meaning, and to experience personal growth, or for the social aspects of the educational experience (Swindell, 1993, as cited in Jamieson, Miller and Stafford, 1998: 214–215). However, these are rather broad classifications; other researchers have refined them somewhat.

Freysinger (1995: 80), for example, had similar findings, but assigned different levels of meaning to them: *agency* (self-development) and *affiliation* (connection with others). Gaskell (1999: 267), in her study of a British-model learning environment, also found that the students' motivations were dominated by meeting social needs and the need for mental stimulation.

Jamieson, Miller and Stafford (1998) surveyed a group of adults attending a residential summer school programme, more than half of whom were over the age of 60. "Specific subject interests" and "intellectual challenge" were rated as the highest motivations (96 percent and 87 percent, respectively), but 69 percent cited "meeting new people" as well as "old friends" (64 percent). In addition to a questionnaire, the researchers conducted a small number of case studies by means of semi-structured biographical interviews in order to map out individual life courses. This study was somewhat broader than a simple survey in that it was designed to associate individuals' reasons for enrolling in an educational programme with specific events or periods in their lives, especially those related to family obligations or work.

In addition, Jamieson et al. (1998) hoped to find out whether the meaning of the educational experience changed for these individuals over time. In analysing the data obtained from the individuals who had left school early and taken up education later in life, Jamieson et al. were able to identify a theme in the participants' narratives that related their motivation to seek education to specific events in their lives that could be regarded as transitional. The authors (1998:221) concluded that education for older adults could be "a means of managing change," not necessarily because life transitions constituted a crisis for them, but because it represented an opportunity for growth and development.

For some older learners, participation in education resembles the kind of commitments they make to various organisations, not all of them voluntary. This appears to be especially true of those who have retired from professional occupations and continue to use their work skills: "they have replaced the work ethic by the 'busy ethic'" (Ekerdt, 1986, as cited in Jamieson et al., 1998: 224). Those who pursue active leisure in retirement often participate in educational programmes, primarily for their social aspects.

Learning for learning's sake, rather than for the purpose of advancing or enhancing a career and without the expectation of a financial return, is as yet a small part of the lifelong learning picture. Scala (1996: 764) found that love of learning was the reason most often cited by students over the age of 60 who were returning to college. Jones and Symon (2001: 270) regard this motive as an expression of the need for and the existence of *serious leisure*. The concept originated with Stebbins, who defined serious leisure as "the systematic pursuit of an amateur, hobbyist, or volunteer activity that participants find so substantial and interesting that, in the typical case, they launch themselves on a career centred on acquiring and expressing its special skills, knowledge, and experience" (1992: 3, as quoted in Jones and Symon, 2001: 272). The qualities that distinguish serious from casual leisure include "perseverance, the following of a 'career' path, significant personal effort, benefits to the individual, the identification of participants with the activity, and the unique ethos that exists within the activity" (Jones and Symon, 2001: 272). About the

only difference from paid work, then, is that there is no pay, and there may not be a tangible outcome.

Jones and Symon (2001: 273, 280) contend that lifelong learning as serious leisure is both a conceptual and actual bridge for older adults between work and leisure. This is a link that will presumably attract more attention from academic researchers as the population lives longer, and as retirement as a concept needs redefinition. As it has been defined by Stebbins above, serious leisure may provide retired adults with many of the non-economic benefits of work that are missed in retirement, such as purpose (a 'path'), personal identity, and a social milieu of like-minded peers.

Johnson (1995) found that the older students enrolled in the UK's Open University were highly motivated by the desire for recognition, a challenge, the stimulation of new ideas, pleasure, and "a sense of achievement", enjoying the "structure and shape it gave to their days of retirement" (Johnson, 1995: 423), a comment which strongly resembles those made by the older adults interviewed by Jones and Symon (2001).

In a study of the perceived meanings of leisure among a group of middle-aged adults, Freysinger (1995) was able to categorise leisure practices as *affiliation* (other-directed) or *agency* (self-oriented) in nature. Affiliation leisure practices were associated with strengthening relationships with family, children, and friends, while agency practices were associated with the desire for learning, challenge, recognition, accomplishment, and self-expression. The subjective experience of the participants in this study was that leisure meant, above all, *change*, "in behavior or activity, . . . in feelings or emotions, . . . in environment or situation, or . . . in one's self and one's outlook" (Freysinger, 1995: 70). In addition, most participants interpreted change as relative freedom that was a choice rather than an obligation.

While these findings make sense in terms of the Second Age phase of adult development, there are suggestions in this research that may apply to the Third or even Fourth Ages. Freysinger cites the work of Kleiber (1985, as cited in Freysinger, 1995: 78–79) on the

developmental need for disengagement and identifying new sources of stimulation, in order “to integrate experiences and feelings and to re-establish ego, identity, or sense of self”. The need clearly does not disappear after retirement from paid work or the years of childrearing and home making.

A number of studies of participation in the Elderhostel programmes have been undertaken, because the organisation is well established, and because it offers a stable research environment in which to explore a variety of factors, including motivation for participation. While Elderhostel, as a model, is not formal university-based education, its programmes are often held on college or university campuses, and all have an educational component. The studies conducted among the Elderhostel programme’s participants are included in this section of the review because they provide an additional source of information about the motivations behind participation in Elderhostel.

Abraham (1998: 535), for example, found that the Elderhostel participants in her sample were predominantly motivated by the desire for social interaction with others who had common interests. Long and Zeller-Hodges (1995: 114) were primarily interested in outcomes, in terms of changes in participants’ attitudes and behaviours. Of interest to the current research, however, is the researchers’ examination of the ways in which Elderhostel programmes met participants’ needs for education. They found that in addition to acquiring specific knowledge, a number of participants emphasised that learning itself was both motivation for participation and outcome. As one participant put it, “If you don’t keep learning, you’re going to vegetate. And then life is not worth living” (Long and Zeller-Hodges, 1995: 124).

Arsenault, Anderson, and Swedburg (1998) studied Elderhostel participants’ motives for participating, with the aim of developing a typology of participants. They identified 14 distinct factors that influenced the decision to participate, from which six profiles emerged, characterised as the activity-oriented, the geographical guru, the experimenter, the adventurer, the content-committed, and the opportunist (Arsenault et al., 1998: 110–112). This last category covers the anomalous individual who merely uses the Elderhostel

programme as an inexpensive means of travel and lodging. Of most interest to the current research is the conclusion Arsenault et al. (1998: 112) reached, that “learning is seldom an end in itself; it is a vehicle through which a person can meet a variety of personal and developmental goals”. While there is certainly a difference between Elderhostel participants and older adults seeking college or university credits and degrees or certifications, at least superficially it is apparent that the experience of learning itself is of primary importance to both types of individuals engaged in education as they age.

2.1.5 Learning Capacity

While it is not within the scope of the current research to review all of the research that has been conducted on cognitive processes and the changes in them across the life span, selected concepts and findings drawn from this research have an appropriate place here for what they contribute to our knowledge of how adults learn and how they approach learning itself.

The Berlin Aging Study data show that psychological function can be differentiated in terms of cognition, self, and social relations, all of which can affect learning competency. Baltes et al. (1993, as cited in Johnson, 1995: 416) observed that older adults enrolled in the Open University (UK) were often anxious about their ability to memorise large quantities of information, adapting by allowing more time for study and stricter study schedules.

Cognitive factors are the most frequently cited in the late life education literature. Browning (1995: 402) found that the psychological research on aging was dominated by work on age-related cognition from the late 1970s to the early 1990s, yet a closer look at the studies showed that there were a number of methodological flaws that interfered with the conclusions drawn. Browning notes, for example, the common practice of comparing experimental results on age alone, in some cases without regard for the health status of the participants young or old, and the use of laboratory settings and unfamiliar test procedures to measure intelligence and memory. The latter circumstance may be highly

detrimental, because the laboratory is so different from the real-life contexts in which older adults actually function. As Browning points out, "experience often compensates for decline in the various components of skills" (1995: 408), which is why exercising cognitive ability is so critical to successful aging. Browning contends that measuring age-related decline in the ability to perform abstract tasks in the artificial laboratory environment does not tell researchers what the effects of cognitive impairments are on older adults' functional abilities in their actual lives.

Kolland (1993: 535) is one of the few to consider the *gerontological concepts* that underlie the process of lifelong development: plasticity, competence, and potential. *Plasticity* refers to an individual's ability to support his or her own adult development through adaptations in the face of barriers and restraints that are encountered. This concept is based on the assumption that early life experiences do not necessarily limit the growth of an adult later in life. The plasticity concept is not meant to be equivalent to *flexibility*, which, in terms of adaptation, does decrease across the life span. At the same time, however, one is reminded of the theoretical work of Baltes et al. (1999: 483) regarding older adults' use of *selective optimisation*.

Kolland (1993) focuses on the role of *adaptive competence* in successful aging, or the ability to change in response to changes in the environment. In later life, Kolland believes, the interaction between the demands of life and an individual's degree of adaptive competence should be used to determine competence, not a comparison with younger people's responses and adaptations. Kolland (1993: 540) therefore prefers the term *competence potential* to more precisely describe older adults' unique kind of creativity, which takes highly individualistic forms of expression, and can also be highly experimental. Creativity among older adults has not been extensively studied, yet what research there is can provide valuable insights for those designing educational experiences for this population and hoping to attract their participation.

Half of the visual artists over the age of 60 interviewed by Fisher and Specht (1999), when asked what was necessary to creativity in later life, cited "a sense of motivation . . .

or drive, . . . a desire to communicate something about the individual's way of thinking, a way of expressing the inner self" (What is necessary, ¶2).

Lindauer, Orwoll, and Kelley (1997: 133) also interviewed a large group of visual artists in their 60s, 70s, and 80s, and found that, overwhelmingly, these individuals believed that age had had a positive effect on their work. As they aged, the artists found that their creative ideas flourished, but their priorities changed, became more focused, and increased their motivation to continue expressing themselves in the visual arts. The older artists in the sample, in fact, perceived themselves as more motivated than the younger artists in the sample. Their adaptations to increasing physical debilities were generally related to their craft, that is, to how, when, and where they worked at their art, rather than to whether they worked at it at all.

2.1.6 Learning Styles

The term *learning style* refers to "the manner in which students consistently respond to and process information in a learning environment" (Truluck and Courtenay, 1999: 223). Learning style influences the setting in which individuals choose to learn, the subjects they choose to study, and their overall approach to learning. The cohort known as the *silent generation*, for example, prefers rote learning, probably because that is the way they were taught as children (Grabinski, 1998: 77). Most research in the area of learning styles has been classroom-based, conducted among children and adolescents and generally lacks a life span perspective.

Of the many measures of learning styles that have been developed, Kolb's Learning Style Inventory (1976, 1984, as cited in Truluck and Courtenay, 1999: 226, among others) is perhaps the best known, and the most often used in research studies. However, the Inventory itself was developed by studying children and adults under the age of 60. Kolb's *theory of experiential learning* claims to be based on a life span perspective, yet Kolb concluded that learning style is less obvious after age 60, and less important in the total educational process (Bonham, 1987: 185, as cited in Truluck and Courtenay, 1999:

226). To date, there has not been sufficient research into the learning styles of older adults in order to constitute a cogent argument with Kolb's view. A study conducted by Truluck and Courtenay (1999) found that their participants were roughly evenly distributed among the four Kolb learning styles, and that gender had no "influence on learning style preference"; in fact, there were "greater differences among men than between men and women" (Truluck and Courtenay, 1999: 232). They also found that educational level attained had no significant influence on learning style.

Jarvis (1989, as cited in Johnson, 1995: 424) proposed three types of older learners, based on their fundamental motivation for learning: *harmony seekers*, those seeking to integrate knowledge with "the meaning of human existence"; *learners*, who are reflective and use their reflections to motivate them to learn more; and *doers*, who "simply enjoy activity for its own sake".

Moreover, older adults tend to use reflection as their primary learning style (Lemieux and Sauvé, 1999) and reflection may be the chief source of their learning capacity. Jamieson et al. (1998: 224) are among those researchers who have identified cases where older learners sought education in order to "search for meaning" or "make sense of their life experiences".

2.1.7 Psychosocial Factors

2.1.7.1 Social Factors

A wide range of social and psychological factors have been examined by researchers investigating the aging process, some of which are applicable to the involvement of older adults in education. This section of the review describes selected factors in an attempt to suggest the range of the potential research that could uncover in more detail how social and psychological factors influence the participation of older adults and the benefits they receive from education in later life.

Antonucci and Akiyama (1991: 1) believe that aging well depends fundamentally on the quality of the social relationships older adults form and maintain in later life. Swindell (1999: 246) concluded from his review of the research that well-being and social networks have been consistently shown to be positively correlated. There is also a strong suggestion in the literature that education in later life and social relationships are deeply intertwined in the perceptions of older adults' motivation for seeking educational opportunities.

The U3A educational model is considered to be particularly effective because of its support of social networks within individual U3A groups. In Swindell's survey (1999: 246), opportunities for forming social relationships with peers who had common interests and experiences were regarded by survey respondents as the most important characteristic and benefit of U3As, after the opportunity for stimulation and intellectual challenge.

Social relationships provide meaning in later life, Pinquart (2002a: 104) found, because they contribute to older adults' sense of self, and make them feel useful, respected, and loved, all of which are important for self-esteem and, ultimately, to well-being and good mental and physical health. Blau (1986, as cited in Hall-Elston and Mullins, 1999: 505) also found that peer friendships in later life were critical to positive self-image, confidence, and self-esteem. In addition, because these peer friendships are chosen, and are not based on obligation, as family relationships often are, they are often more satisfying to older adults (Mullins and Dugan, 1990, as cited in Hall-Elston and Mullins, 1999: 506).

Social support systems act as *mediating structures* by bridging the gap between their members' needs and unresponsive societal institutions (Levin and Idler, 1981, as cited in Query and James, 1989: 166), and are particularly important for older adults who have experienced losses of their occupational identities, social networks formed at work, and family members and close friends. Mediating structures are considered to provide older adults with the means to improve their perception that they are in control of their lives.

Query and James (1989: 167) are quick to point out that there are distinct conceptual differences between *social support* and *social network*: "Social support may be viewed as emotional, instrumental, and financial products delivered through the web of friends and acquaintances that surround an individual," while the "friends and acquaintances *are* an individual's social network" (italics added). In the context of their study, Query and James described a mediating structure as a social group that supported its members' well-being through frequent personal interactions.

Older adults committed to an educational programme may be considered to belong to such a mediating structure. The U3A concept, because volunteers staff it, may also act as a mediating structure. Certain factors, however, determine whether, in fact, a group provides the kind of social support that can be considered to be mediating, according to Query and James (1989: 172). A true mediating group should be dense enough to provide a multiplicity of frequent social contacts, and be connected through its members to other groups that may be drawn into a relationship with the primary group. A true mediating group should also be central to the lives of its members, who should feel strongly bound to one another, and offer active reciprocity in terms of each other's needs. Nonetheless, the primary function of such mediating groups is to support the social skills of their members in an environment that is not threatening and that relies on communication as its most critical and central social process.

In the view of Query and James (1989: 175), social skills and communication skills are synonymous, and are critical to providing and receiving social support. These researchers investigated communication competence and social support in a sample of elderly individuals whose median age was 75 years and who were living in senior communities. The participants were predominantly women (93 %) and widowed (66 %).

While Query and James (1989) expected to find that the participants with the most competent communication skills would also be the most satisfied with their social relationships in terms of the support they received, this hypothesis was not confirmed. This finding suggested to the authors that these individuals had become more tolerant of

less-than-satisfying levels of social support over time. They also suggested that as older adults lose significant others who die or move away, they have increasing difficulty forming close relationships and maintaining them, so that at a certain point, the effort involved seems too great. At the root of this decline, Query and James (1998:177) suggest, is a parallel decline in older adults' "emotional elasticity" and their capacity for intimate friendships with peers who may eventually be lost to them.

In a review article, Antonucci and Akiyama (1991: 1–2) looked at the research examining the developmental aspects of social relationships across the life span in an effort to detect the role these relationships play in aging well. They identified two perspectives: the direct effect on an individual's sense of well-being and the indirect, or buffering effect, which helps individuals to cope with or moderate the stresses they experience in other aspects of their daily lives. Reviewing the literature that explored how social relationships affect well-being, Antonucci and Akiyama cite researchers' findings that relationships contribute to the perception of personal control over one's life, provide support for a sense of social competence, and contribute to powerful cumulative feelings over the life span (Pearlin and Turner, 1987; Sarason, Sarason, and Pierce, 1990; Antonucci and Jackson, 1987, as cited in Antonucci and Akiyama, 1991: 5).

2.1.7.2 Psychological Factors

Siebert, Mutran, and Reitzes (1999: 522) are among those researchers who have used *role identity theory* as a basis for research into the psychology of aging. This theory is based on the idea that individuals organise their social relationships by classifying people according to their perceived social roles (1999: 525). *Role identity* is an individual's perception of the role he or she plays in relation to others in his or her social network. The theory proposes that, as individuals age, the number of social roles available to them diminishes. In Western societies, especially, there are no clearly defined roles for the elderly, which can lead to reduced self-esteem, among other psychological effects.

One's internal role identity is a strong behavioural motivator, because how an individual feels about himself or herself is strongly influenced by the responses and treatment of others. The greater the difference between another's feedback and an individual's role perception, the more motivation there is for that individual to seek positive support for that role elsewhere. Older adults, in particular, seek out friendships with others who support their perception of themselves, particularly the friendship of peers. Peers provide the reassurance that older adults need in order to counteract the sometimes-negative self-images projected by younger social contacts and younger family members (Siebert et al. 1999: 529).

Siebert et al. (1999) concluded that older adults' social selectivity is based on their need for friends who positively reinforce their identities. This theoretical basis may partly explain the expressed interest of older adults in educational experiences which offer social contacts with peers who have similar interests and experiences, because those contacts will reinforce their role identities, particularly important, perhaps, at a time when they assume a new role identity as 'students'.

Anstey, Luszcz, and Andrews (2002: 86) studied psychosocial predictors of mortality based on data drawn from a larger research effort, the Australian Longitudinal Study of Aging, with a focus on participants aged 70 and older. Of particular interest to the current research is that they measured psychological well-being in terms of self-esteem, morale, perceived degree of control, and overall satisfaction with life. In addition, they looked at the data on social memberships. Overall the authors found that psychosocial well-being, comprising self-esteem, control, and morale, was "inseparable from health and physical function in very old adults" (Anstey et al., 2002: 85).

Pinquart (2002a: 106) suggests that purpose in life and subjective well-being may have a bi-directional relationship. He proposes that the perception that one's life has purpose produces positive feelings, while at the same time, when subjective well-being is high, individuals may be more optimistic and more motivated to pursue meaningful goals and activities.

Takahashi, Tamura, and Tokoro (1997: 419) studied the association between well-being and social relationships in a group of Japanese adults aged 65 and older. The interesting contribution of this study is that the researchers attempted to go beyond the broad categories of family and friends because they believed that individuals vary greatly in the ways in which they evaluate their relationships, and because individuals tend to designate others as sources of support or as confidantes without regard to whether they are related by blood or marriage.

In their study, Takahashi et al. (1997: 427) classified participants according to the most dominant person named by each individual in their social networks. They found that the perception of well-being was not influenced by whether the dominant individual was a friend or a family member. This finding provides support for the idea that older adults appear to benefit from the kinds of social relationships they are able to form with the people with whom they share educational experiences in later life.

Loneliness is a major theme in the literature on aging, perhaps reinforcing the negative stereotypical image of older adults as lonely and socially isolated. The meta-analysis of the relevant literature conducted by Pinquart and Sörenson (2001: 260), however, underscores the superficiality of the stereotype. The correlational picture of loneliness they found is far more complex than the stereotype implies. For example, despite the loss of a spouse, peers, and frequent contact with friends made at work, older adults in some studies were found to experience a wide range of responses to these losses.

Pinquart and Sörenson (2001: 259) found that the quality of social relationships was significantly more important than the quantity of relationships. The level of emotional support received from social contacts was the principal factor that influenced perceptions of loneliness. Of interest to the current research is the finding that individuals with higher levels of self-confidence and involvement in meaningful activities were less likely to report that they felt lonely. While this finding might be expected, even assumed, loneliness is not a simple state, but is a perception influenced by a great variety of factors.

Finally, much has been made in the literature of the concept of independence. In the studies of older adults engaged in educational activities reviewed here, independence was invariably associated with older adults' perceptions that they had control over their lives and a sense of freedom (Searle et al., 1995: 107). Some studies have also shown that involvement in later life education contributes to a sense of control because of its relationship to a sense of confidence in the ability to learn (Price and Lyon, 1982, as cited in Kolland, 1993: 535).

2.2. MODELS OF LEARNING FOR OLDER ADULTS

2.2.1 Introduction

In catering to the learning needs of older adults, a number of programmes have evolved which reflect different social agendas and different priorities. Three of the earliest models in the Western world: the Institute of Learning in Retirement and the Elderhostel movement in the USA, and the *L'Université du Troisième Age* in France, are more different than similar in their approaches. The British model U3A, established in Cambridge, England, followed some years later and reflects yet another paradigm.

Some programmes, such as the Institute of Learning in Retirement, emphasise member participation in all aspects of the educational programme, including curriculum design, collaborative leadership and peer teaching. Elderhostel programmes, on the other hand, are faculty driven but provide significant travel opportunities.

The University of the Third Age (French model) was entirely university based, and responsive to a government mandate to provide educational services to the elderly. As with Elderhostel, the planning and delivery are managed by professional staff while the students experience, but do not control, the agenda or activities.

The British U3A model, in making the participants their own authority for both instruction and planning, reflects a "self-help" and "self-sufficiency" approach. Britain

has a long history of innovative ideas in adult education (Shelton, 2001). In the Open University, established in 1969, people had the opportunity to earn academic credits for degrees in part-time study, with no academic entrance requirements and at lower fees than conventional universities. The Open University pioneered new course delivery methods such as broadcasts on television and radio, correspondence work and summer schools. Leaping from this platform of egalitarianism, it is hardly surprising that the U3A programmes that emerged in Britain featured peer responsibility and authority as the foundation of the U3A learning experience.

The French model of U3A spread to continental Europe, where countries had adult education programmes that were not specifically for older adults. In Germany, the *Volkshochschule* (Communal Adult Education) has existed since 1902 (Nitschke, 1998); it still has 9.5 million people taking part in courses every year (Horstkotte, 2003). Similar programmes also exist in other countries of continental Europe, such as the *Volkshochschule* in Germany, which has no connection with universities.

Is it possible to identify one of these various models as superior in meeting the needs of older learners? This may depend on what are identified as the most important reasons for the establishment of such a programme. The creation of productive leisure opportunities for the middle class may demand very different structure and content than the creation of 'second chance' educational opportunities for those who were disadvantaged earlier in life. The possibility of harnessing brain trust and human resources for society, which would otherwise be lost with retirement, is yet a third agenda, with its own very different imperatives.

Gaskell (1999: 273) suggests that all models for senior education should harness what is positive in the aging process, particularly those skills of critical reflection that develop out of the length and breadth of seniors' life experiences. In addition to enriching the quality of academic exploration, the ability to reflect critically on life experiences is associated with enhanced well-being, satisfaction, and a sense of purpose in life.

Some attention has been paid to the specific educational needs of older adults by researchers interested in educational models for this population. Waskel (1982, as cited in Kressley and Huebschmann, 2002: 840), for example, identified:

- the need to cope with the changes advancing age brings;
- the need to express oneself physically, mentally, and emotionally;
- the need to feel useful;
- the need to feel in control of one's life; and
- the need to feel that one has made progress.

Beyond their specific instructional needs, older adults need educational facilities that accommodate them with easy access, convenient scheduling and locations, and lighting, acoustic, and other environmental adaptations to their potential functional impairments.

For many seniors, affordability is also a continuing issue. While some senior education programmes commenced with very low fees, fiscal access has re-emerged as an issue with the gradual escalation of costs for participants.

Several of the studies investigating the learning needs of older adults indicate the importance of meeting seniors' social needs. Swindell (1999: 246) found the U3A model particularly effective because of its support of social networks within the U3A groups. Relationships with peers who had common interests were found to be most important after the opportunity for stimulation and intellectual challenge. The importance of social needs in later life has been documented earlier in this review, as indicated by Pinquart (2002a: 104), Blau (1986, as cited in Hall-Elston and Mullins, 1999: 505) and Mullins and Dugan (1991, as cited in Hall-Elston and Mullins, 1999: 506).

The U3A educational model is considered to be particularly effective because of its support of social networks within individual U3A groups.

2.2.2 Elderhostel

One of the best-known models, Elderhostel, was founded in the mid-1970s in the north-eastern United States as a not-for-profit organisation. Founders Marty Knowlton (a world traveller and former educator) and David Bianco (a university administrator) organised the first Elderhostel programmes in 1975 at five colleges and universities in the state of New Hampshire (Elderhostel Inc., 2004a). Elderhostel combined two ideas. First, it was a way of complementing the education of the cohort who had had their learning interrupted by the Depression and World War II. It also provided affordable, stimulating leisure activities to the first American generation to retire from wage earning while still relatively young and healthy. The combined effects of New Deal programmes such as Social Security, the advent and spread of private industry pension plans, and post-war prosperity created what may have been the world's first population of non-wealthy, non-working senior citizens who lived apart from their children and extended families.

The teaching was initially provided through week-long non-credit courses on academic campuses (Stephan, Leidheiser, and Ansello, 2004). International programmes were offered a few years later in Mexico, Great Britain and Scandinavia, and Elderhostel became an educational and travel organisation. Today, "Elderhostel is the world's largest education and travel organisation for adults 55 and over" (Elderhostel Inc., 2004a). Courses are taught by regular faculty at 750 universities, colleges, and organisations worldwide. They provide low-cost, temporary residential academic courses at each institution (Baires, 1996: 26).

Elderhostel spread across "the Unites States, to Europe, Asia and elsewhere, drawing thousands of travelling older learners to hundreds of learning sites" (Stephan et al., 2004). Young (1996) notes that "Elderhostel programs are hosted by educational institutions and organisations in all fifty states and the District of Columbia, in Canada, and more than fifty countries overseas. In 1994, almost 1,800 participating institutions served almost 300,000 Elderhostelers."

None of the Elderhostel courses take old age as the subject matter. This, according to Peterson (1983, cited in Manheimer, Snodgrass, and Moskow-McKenzie, 1995: 55), "is based on the view that courses that deal with aging teach people to be old". Combining education with travel gives Elderhostelers an opportunity to discover the people, culture and history of other countries.

Research has shown (Culbertson, 1997, as cited in Moody, 2004) that the average age of the participants in Elderhostel programmes is 70, and that nearly two thirds of the members are females; a similar proportion are graduates from colleges. As Moody (2004) remarks, "This makes the Elderhostel population an elite group."

There is an Australian version of the Elderhostel education model, the Australian and New Zealand College for Seniors, which conducts some programmes in conjunction with Elderhostel, based at the University of Wollongong (Swindell, 1991a, cited in Dale 2001: 780).

In 1988, Elderhostel established the Elderhostel Institute Network (EIN), based in the US, to support the Institute of Learning in Retirement.

2.2.3 Institutes for Learning in Retirement (ILR)

Another campus-based programme from the United States is the Institute for Learning in Retirement (ILR), which operates as an independent organisation affiliated with a college or university and offering college-level courses. Individual colleges and universities, especially those that are part of a state higher education system, offer courses to older adults on an audit or tuition-waiver basis.

ILR has existed since 1962. A group of 152 retired New York City schoolteachers, under the leadership of Hy Hirsch, founded a scholarly home for themselves in Greenwich Village where they organised a learning community at the School of Social Research (Nordstrom, 2002; Stephan et al. 2004; Markowitz, 2001). They originally called it the

Institute for Retired Professionals (IRP). They developed this community of peer-learners, all curriculum creators, teachers and students. This concept grew slowly at first as its participants 'advertised', primarily by word of mouth. Since the early 1980s the programme's development has accelerated.

The members of ILR organisations are groups of people who have retired and who are seeking learning opportunities. They come together to plan, participate in, and often conduct educational courses for their community. A wide range of educational institutions sponsors ILR across North America. More than 150 ILRs have joined in an association, the Elderhostel Institute Network (EIN) (Young, 1996; Manheimer et al. 1995: 56–57).

Nordstrom (2002), the programme manager of EIN, states that each institute is unique, but that they all have common factors. Though each institute is sponsored by a host college/university, learners are encouraged to take "ownership of their institute" by paying fees to support it, and by participating in all aspects of the curriculum, instruction, and administration. Like the British U3A, the EIN programmes reflect an egalitarian, self-help model of peer expertise and authority.

According to Manheimer et al. (1995, cited in Brady, Holt, and Welt, 2003: 851–852), "The use of peer teachers – in addition to the programme being sponsored by a college or university, charging modest membership fees and tuition, being predominantly age-segregated, and offering a wide range of liberal arts and cultural offerings – is considered to be the core ingredient in distinguishing a Lifelong Learning Institute from other programs in adult or older adult education." Members are also involved in planning, programme design, evaluating, and the administration of the programme (Manheimer et al., 1995: 56).

Jarvis (2001), Knowles (1990), and Merriam and Caffarella (1999, cited in Brady, Hold, and Welt, 2003: 853) state that the "peer-teaching model expresses several ideals in adult education practice including a voluntary spirit, andragogy, and self-direction".

Brady et al. (2003: 852) interviewed 48 peer teachers of Lifelong Learning Institutes, in which courses were planned and taught by members, and found that while peer-teaching has become an important growing aspect in older adult education, very little research has been conducted in Lifelong Learning Institutes. There are no educational prerequisites and no examinations.

The goals of EIN, according to Nordstrom (2002), are "to help establish new institutes, provide resources and services to establish new institutes and develop an all-inclusive organisation of institutes for learning in retirement". EIN does not prescribe fees or approve curricula of new ILRs, as the ILRs are independent. The fees ILRs initially had to pay to EIN were dropped later and services were streamlined. This helped to produce a large increase in ILRs who belong to EIN. Stephan et al. (2004) remark that there has been a rapid development of these college- and university-affiliated institutes. They are now called Lifelong Learning Institutes (LLIs), and there are more than 500 throughout the Unites States and Canada.

The ILR model varies greatly from campus to campus as each group created a slightly different version. DeGirolamo (2003) and Manheimer et al. (1995: 56–57) observed that while many universities and colleges present opportunities for seniors, the programmes differ greatly; they are as unique as the creativity of their participants. According to Elderhostel Inc. (2004b), "There is no one 'model' for an LLI; all are independent entities, each created by a unique group of people, sponsored by a host campus with its own special character." Manheimer et al. (1995: 57) believe, "The program is founded on the desire of adults to pursue learning for pleasure and stimulation, and to do so in the company of others similarly motivated."

2.2.4 The University of the Third Age

Like the post-war United States, post-war Europe found itself with a population of middle-class retirees, many of whom had lost youthful schooling opportunities to the depression or the two world wars. To meet their needs, another educational model, which

spread rapidly around the world, was developed as the University of the Third Age: "U3A has developed into a global adult education success story, spreading to all continents, and amounting to several thousand units with varying structures and programs" (Louis, 1995, cited in Formosa, 2000: 321). The name "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: 4).

The term third age, as applied to education, appears to have originated in France in 1973, when the University of Toulouse offered summer programmes for retired adults, referring to the programme as a *université du troisième age* (Glendenning, 2001: 63). In this context, it refers to those who have finished working and are pursuing additional formal education: "Universities of the Third Age have followed different models but two ideal types predominate: the French model, based on close association with the traditional university; and the British model, which operates more in the spirit of mutual-aid and self-help" (Swindell and Thompson, 1995, cited in Moody 2004).

2.2.4.1 The French Model

Legislation passed by the French government in 1968, which required universities to provide more community education, provided the "appropriate political climate for the evolution of an idea like U3A" (Swindell and Thompson, 1995: 431). In 1973, according to Pierre Vellas (2003), "Founding Father" of the French U3A, and professor of political economy: "the creation of the University of the Third Age of Toulouse, was proposed . . . to the Administrative Council of the Teaching and Research Unit" of Toulouse University. The Council was made up of a group of influential people. Apart from professors and students, three external members with international responsibilities served on the committee: deputy director generals of the World Health Organization, the International Labor Organization, and UNESCO. The aim of the proposal presented to the council was to investigate what the university could do to improve the quality of life for the elderly. The programme they proposed was unanimously adopted: summer schools for retired adults were offered and the first University of the Third Age,

L'Universite du Troisième Age, came into existence, and became known as the *French model*. Its purpose was to improve the quality of life for older adults. From 1973 on, university faculties on traditional campuses conducted courses for third age students.

The U3A was open to anyone past retirement age. Qualifications were not offered and examinations were not required. Fees were kept to a minimum (Swindell and Thompson, 1995: 431-432, cited in Radcliffe, 1982). By 1975 the French model had spread to other French universities, and to universities in Belgium, Switzerland, Poland, Italy, Spain, Quebec and California (Swindell and Thompson, 1995: 431–432, cited in Radcliffe, 1982). Today, the French model of the Third Age University (UTA) is still offered by many universities in Europe, using mainstream university buildings and university teaching staff.

The financial commitment for students varies greatly among the French model universities; some charge reduced fees for every course students take, others pay reduced semester fees, and some of the universities make use of donations from local authorities. The programmes offered by the universities also vary widely: some provide open lectures only, some give negotiated access to university courses, and some include excursions in their programmes. Most U3A courses in Europe are non-credit-bearing. Swindell and Thompson (1995: 432) observed that because of economic difficulties during the 1990s, a greater number of universities expect course participants to pay for courses and facilities. If this continues, or if universities face greater financial problems, then this may create a barrier to participation, as most third age learners have limited incomes.

A comparison of the financial commitments for students (members) and programmes available in the French and British U3A will be discussed in one of the following sections of this review.

After the successful launch of the French model, another U3A model was established in Europe nearly ten years later.

2.2.4.2 The British Model

The *British model* of third age education originated in 1981 when Peter Laslett (often referred to as the founding father of the U3A British model) convened a meeting of social scientists at Cambridge University. The model they designed differed from its French counterpart. The model is based on self-help and self-sufficiency and is not usually affiliated with traditional educational institutions. It is open in the sense that there are no academic admission requirements and no examinations.

One of the principles, as stated by 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." Hence, in the British model there is no distinction between the teacher and those who are being taught. The members (as opposed to students) can choose their own subjects. They can choose their tutors from among the members, and can determine the methods of teaching. It is total democracy in action.

Another of the principles of the U3A is "to make those in later years in Britain aware of their intellectual, cultural and aesthetic potentialities, and of their value to themselves and to their society. To assail the dogma of intellectual decline with age" (Laslett, 1996: 227). The British self-help model is based on the knowledge that there is an enormous resource of experts of every kind among those who have retired.

As Midwinter, writing about the British model, remarks: "The earlier 'French' version of U3A, for all its virtues, was about older people negotiating a contract for services from an academic agency, if there was one conveniently located. Our view was always that Third Agers should be liberated to organise their own affairs and invent their own destiny. It was about older people being the creators, not the recipients, of a service" (Midwinter, 2003: 1).

Findsen (2001) is among those who believe that providers of education have seldom placed older adults at the centre of learning. They are often neglected by mainstream educational agencies. “However, U3A epitomises an exemplary self-help agency, which has control over the curriculum as well as the teaching and learning conditions, importantly controlled by older adults for older adults” (Findsen, 2001).

This autonomy has had an important impact on curriculum design. The content of the curriculum is what the older adults desire, not what ‘second age’ lecturers think the elderly need, like “How to survive in retirement” or “How to remain healthy and financially well off”. U3A curricula range from philosophy, sociology, and architecture, to mahjong and oil painting. The only limiting factors are the wishes of the U3A members and the availability of knowledgeable instructors among the membership.

Midwinter (2003: 2), one of the U3A co-founders, explains that this ethos has been an important aspect from the beginning:

> A tiny myth has emerged of late that we turned to the self-mobilising device of U3A because the existing universities would not provide proper courses for older people. It is true to say that most of the universities were loath to offer assistance, but that was all we were asking for. It has always been the intention of Peter Laslett and Michael Young, my illustrious co-founders, as well as myself, that the true principle of Third Age activity was that control should be in the hands of the Third Agers.

The self-help philosophy relies on the availability of able instructors across a broad range of subject areas. There are already many U3A members who, because of their background training in their second age or because of interests they developed after retirement, are capable of serving as tutors to their U3A colleagues. This pool of competent adults who are able to teach will increase as the well-educated baby boomer cohort reaches retirement age. As Manheimer (2002) predicts, “A rapidly growing pool of competent, college-educated adults will soon reach their retirement years. Even though many will choose to work part time, they will also seek out continued learning opportunities.” Many of them will be drawn to educational organisations where they can use their life experiences and contribute in teaching and organising roles.

Older learners bring a wealth of talent to the classes they attend. Their new learning is complementary to already accumulated experience. Carlton and Soulsby (1999) maintain that the learning that older adults engage in is often for direct use, and not so much for the future. Older adults are also "conscious of interchanging roles of tutor and learner and less inclined to accept taught input uncritically" (Soulsby, 1999: 76).

Even with all their knowledge and experience there is evidence that initially older learners may be intimidated by traditional classroom situations and prefer peer-group learning: "The more supportive environment allows them to gain confidence and overcome their self-perceived ignorance of the subject matter" (Carlton and Soulsby, 1999: 76).

Swindell and Thompson (1995: 432) think that in the British model, "The self-help ideal was based on the knowledge that experts of every kind retire, and thus there should be no need for older learners to have to rely on paid or unpaid second-age teachers. Laslett (1989) provided a strong rationale for this approach."

The self-help approach has incorporated the peer-teaching concept that has, for many learners, proved to be an enjoyable feature of U3As. There is the expectancy of reciprocity – peers will teach and learn from each other. Brady et al. (2003: 853) see the importance of this: "Peer teaching is a rare and provocative model of education in which, in the morning, a person may teach a class for her peers, and that same afternoon have one of her 'students' become her teacher."

Cusack uses the term *critical gerontology* to encompass a range of concepts, including empowerment and education in later life, that are meant to liberate "people of *all ages* from a view of old age as an expensive, expansive wasteland and older people as useless burdens on society" (1999: 22, italics original). The Gerontology Research Centre at Simon Fraser University in Vancouver, Canada, has developed a programme that combines research and education to develop community service leadership in older

adults, primarily through the process of empowerment. The issue of empowerment has broad political and social ramifications, many of which are outside the scope of this review. However, as a concept it is directly related to the U3A educational model, if one accepts the definition of empowerment offered by Cusack (1999:27): "sharing responsibility and enabling seniors to take a more active role in decision-making processes and in delivering services to their peers".

Midwinter (2003: 1) declares: "Our philosophy was based on the sound concept that cooperative, self-motivated learning was in many respects a more effective method than the one customarily applied in schools and colleges."

Creation of the Third Age Trust

After the initial rapid growth of U3As in the United Kingdom, the Third Age Trust (a registered charity) was formed in 1982. This is the national representative body for the University of the Third Age movement in the UK. It serves as umbrella organisation to provide a national focus. Its board, known as the National Executive Committee, consists of elected representatives of U3As throughout the UK. Each local U3A is an autonomous unit responsible for organising its own programme. The U3A Trust, however, provides local U3As with some educational resources and support to help in running their groups. Each U3A contributes a capitation fee of £2.50 per member (The Third Age Trust, 2004a). There are now more than 540 U3As in the UK, with a membership of 141 514 (The Third Age Trust, 2004b).

2.2.4.3 The U3A in Australia

The initiative to develop U3As in Australia came from a small group of people who had developed an interest in the U3A concept in Britain. They decided that this idea would be worthwhile transplanting to Australia, and a public meeting was arranged in Melbourne in 1984. The first programme was launched with support from the Council of Adult Education, which found space for this first "City of Melbourne U3A". A year later, after

two more meetings, four other U3As came into existence in the state of Victoria (U3A Network Victoria, 2004).

Swindell and Thompson (1995) looked at U3A models internationally in order to identify differences in operations and participation. When the British model was introduced to Australia in 1984 it spread to 108 independent groups in its first ten years, in all the Australian states and territories (Swindell and Thomson, 1995: 433). There is limited communication between campuses, and there is no central organising body responsible for overseeing all of the groups. Swindell and Thompson suggest that the lack of a central organising body was deliberate, possibly because the members were reluctant to create the kind of bureaucracy in which many of them worked during their second age.

Since the development of the British U3A model in Melbourne, the movement has developed rapidly throughout the state of Victoria, and throughout the whole of Australia. After 20 years of existence, all U3As have remained autonomous self-help organisations in which older learners share their knowledge with others. This consistency is all the more remarkable given Australia's explosive population growth cycle, and U3A development and expansion has occurred throughout the entire nation without centralised coordination.

In the state of Victoria, with a population of 5 million (ABS, 2003), there were a total of 62 U3As in 2001. The sizes of the U3As ranged from 19 to 1159 members (Hurworth and Harvey, 2001: ii). In 2004 the membership of the U3A in Australia was 53 456. Victoria has 68 U3As with approximately 18 000 members aged 55 and above, of whom 24 percent are males and 76 percent females (U3A Network Victoria, 2004). As McDonell (1995: 3) identified, "U3As have become Australia's fastest growing educational movement."

Swindell (1993: 260, as cited in Swindell and Thompson, 1995: 433) states: "Apart from a few exceptions, the communication between the U3As is limited. A number of well-organised state networks exist; however, many individual U3As remain resistant to the

idea of a national organisation similar to that operating so successfully in the United Kingdom or United States." Victorian U3As do, however, have a coordinating body: The U3A Network Victoria. As McDonnell (1995: 3) explains, "The Network is an association whose members are Victorian U3As rather than individuals. It was incorporated in 1988 with 11 foundation members."

The purpose of the Network is to provide communication with and services for U3As. It provides meetings and discussions and produces a newsletter. It also helps with advice for the establishment of new U3As, and represents the interests of U3As at state government level. It has an office in the city of Melbourne, which is staffed by U3A volunteers. Each Victorian U3A contributes to the Network a capitation fee of AU$0.80 per annum per member. The Network in no way imposes any kind of uniformity on its members; it would be impossible to do that, as each U3A has remained autonomous. There is generally little communication between the U3As (U3A Network Victoria, 2004).

2.2.4.3.a The Administration and Funding of Australian U3As

The great majority of the Australian U3As are independent incorporated associations. All U3As in Australia are self-governed and self-funded. The operational costs of U3As are minimal, due to the fact that all administrative personnel – that is, secretaries, typists, treasurers, telephone operators, and all tutors – are volunteers. They do not receive any remuneration. Membership subscriptions cover most of the other expenses such as accommodation rental, equipment, newsletters and general running costs. Most Victorian U3As receive, if they apply for it, an annual small grant from Adult, Community and Further Education (ACFE), which usually covers the cost of basic office and classroom equipment. Some have found a way to set up a computer centre, or have made use of Technical and Further Education (TAFE) computer classrooms. Office space is frequently inadequate. Hurworth and Rutter (2001: 23) found that nearly half of the U3As in Victoria indicated that they were dissatisfied with the space available to them for administrative purposes.

Funding for U3As by government departments has been minimal. The total organisation relies on voluntary participation and teaching and has a democratic, peer-based foundation. The administration tasks are also voluntary and unpaid. Members pay a small annual subscription. A number of U3As operate central offices for their administrative operations, and volunteers who provide many hours of service throughout the year staff these offices. As Swindell (1999: 239) explains: “teams of office workers carry out many of the key administration tasks such as updating membership records, writing receipts, maintaining timetables, answering queries”.

2.2.4.3.b Teaching

Hurworth and Rutter (2001: iii) found that 260 individual subjects were being offered by Victorian U3As; some were concentrating more on traditional academic subjects, while others offered a wider range of activities such as oil and watercolour painting, bridge, music appreciation, and Tai Chi.

Members choose their own learning activities. There are no examinations, and no educational qualifications are required or given. Members share their expertise and knowledge with fellow members. It is democracy in action.

In Australia, as in Britain, there is no division between members who teach and those who are being taught. In addition to choosing subjects, members can choose their tutors and determine the methods of teaching. If course objectives or course content are not what the members expect or need, the course can be discussed and changed on the fly. In a rigid educational environment this would hardly be possible.

U3A programmes do present challenges to those who teach, as the educational backgrounds of members vary greatly, and so do the needs and expectations of members. All are motivated to learn, but to teach a range from beginners to those with considerable background knowledge would generally not be easy; however, because there is such a

sense of community spirit, all of the members work together as a group and support each other.

2.2.4.3.c Accommodation

In their extensive "Accommodation and clusters options" research of U3As, Hurworth and Rutter (2001: ii–vi):

- looked at services provided for the over-55 population by local governments in the state of Victoria;
- made educational needs assessments and assessed the relationship U3As have with local governments and older adult/education providers and their knowledge of U3As;
- covered detail about membership, courses, administration, accommodation (housing), equipment, income and expenditure.

Hurworth and Rutter (2001) looked at accommodation and the potential for increased U3A activities in Victoria and found that in 2000 there were 16 000 members, and that the majority were between 60 and 79 years of age. Group size in Victoria per U3A varied from 19 to 1159 members, and with the exception of one, all groups over 400 were found in the Melbourne metropolitan area. This decentralisation of U3As is important, as accessibility and convenience are important factors in older adult education. Two thirds of the U3As predicted that their membership would increase by 5 to 25 percent over the next few years (Hurworth and Rutter 2001: ii). There is no maximum membership size to U3As at present.

Swindell and Thompson (1995: 443) maintain that it is likely that, in Australia, many self-help U3As receive what might be described as "hidden subsidies". These would include the free or heavily discounted use of community halls, public libraries, school classrooms, and the like. They also maintain that even if these subsidies were removed, many U3As would likely continue, running from members' homes if necessary.

Accommodation for U3As varies greatly. In 2000, Hurworth and Rutter (2001: v) found that U3As in the state of Victoria operated from about 400 venues, of which 38 percent were private homes. Local Government and Adult Community Education only provided 20 percent of the venues. The majority of U3As could foresee the need for new or extra accommodation.

A multitude of departments at the local government level are responsible for the planning for older adults; they mainly deal with social support, recreation and leisure, disability services, building and planning, and aged care. U3As do not really fit into any of their categories, neither care nor pure recreation appear to be appropriate. U3As also do not fit into the traditional education section (Hurworth and Rutter, 2001: 40). The problem seems to be that there have not been definite policies for education after retirement by local governments, nor by the Victorian state government or the federal government. Likewise, traditional educational institutions have not really accepted the need for learning after retirement. Very few local councils have acknowledged that there are perceived benefits in lifelong learning (Hurworth and Rutter, 2001: 44).

2.2.4.3.d Cost of Membership

One of the most important aspects of education for older adults is that it has to be affordable – the most retirees have a limited income and have to budget carefully. Dale (2001: 791) refers to a study that showed that post-retirement incomes were very low, and that women were significantly worse off than men.

For those who would like to take up regular university studies, the cost barrier would be insurmountable. Only a small percentage of older adults could pay AU$1,500–3,000 for a single university subject per year or AU$12 000–16 000 per annum for university degree courses (Toon, 2004).

U3A members enroll at the beginning of the year, and the annual membership fee for U3As is so low that it is affordable for all. In Victoria the membership fee is AU$20.00–

30.00 per annum. There are no course fees. The annual membership fee entitles members to attend as many courses as they wish, subject to limitations on class sizes. Apart from a short semester and Christmas holiday break, courses are conducted throughout the year. Just as in Britain, those who have enrolled are called members, not students. U3A members can, if they wish, also attend a course at one of the other U3As.

Tutors are also U3A members and give their services free of charge. Members receive a U3A newsletter at the beginning of the year; it also contains a list of the courses offered for the coming term or semester and a timetable. U3As have elections at the end or the beginning of the year when they elect committee members, among them the president, vice president, treasurer, secretary and course co-coordinator. There may be slight variations to this in some of the U3As as each one is totally autonomous. The U3A Network, which exists in Victoria, as mentioned earlier, is only a coordinating body; it does not impose uniformity on its member U3As.

2.2.5 The Differences between the Models of Learning

2.2.5.1 The French U3A Model and European Variations

French U3As today are still linked to and administered by universities. The courses are mainly teacher-directed. University committees draw up curricula and university faculty usually conduct the teaching. The fees students have to pay, the programmes offered by universities, and the hours of lectures students can attend per annum, vary greatly. In France and Belgium, most U3As are university-based, and in the early 1990s began broadening their range to include more community members (Swindell and Thompson, 1995: 435). In Switzerland, some U3As are university-based, as are the majority in the Netherlands and Germany. In Austria, U3As are actually organisations composed of older students in a university community, unlike the British or French models, and resemble counselling or mentoring support groups.

Formosa (2000: 315), whose "critical field research" was carried out at the French model University of the Third Age in Valetta, Malta, states that the U3A is "…in the hands of a committee chosen by the University of Malta". They design the curriculum, and tutors are full-time or part-time university lecturers, paid according to university rates (Formosa, 2000: 324). In most subjects the standard is high; participants are, however, "not expected to sit for the examination" (322). Only 2 percent of all older persons in Malta are members of the U3A. Formosa remarks that members expressed the view that the "lectures are of a high standard and that many older persons do not have the necessary educational background to comprehend the lecturer's presentations" (2000: 323). The U3A offers a wide variety of courses, but they are "based on the assumed needs and interests of older persons" (323). As for possible reasons why the participation rate is so low in the French U3A model in Malta, Formosa (2000: 323) has observed, "Valetta U3A is grounded in mainstream and traditional models of educational practice which equate education as a one-way flow of information from teachers to students."

The *Universität Zürich*, Switzerland, in their 2003 *Jahresbericht* (annual report) declares, that the *Senioren-Universität* is totally self supporting; the use of administrative personnel, office and class room use, and university lecturers, have to be covered by membership fees. The programme they offer consists of 50 open lectures (addresses) per annum, usually two per week, each one with a specific theme; they also offer excursions and visits; they do not offer university courses as such. The university faculty believes that teaching methods and programmes must be specially suited to the needs of the elderly. The membership for the year 2002 was 2006. The university charges Fr.60.00 per semester or Fr.90.00 for the summer and winter semester. Entrance requirements are not stated. There are other *Senioren-Universitäten* connected to several of the Swiss universities. All programmes are university controlled and academic in nature. They offer mainly guest speaker sessions, each of one hour duration, one or two per month, covering different subject areas. The fees are around Fr.100.00 per semester.

In Germany, U3As are also linked to universities. The programmes they offer are also quite academic in nature. The *Universität Osnabrück* has a section, *Universität für Ältere*

(University for Seniors). According to the winter semester programme (2004/2005), the charges are €50.00 per semester, for up to four lecture hours per week. For more hours the price increases to €75.00. Eight hours per week is the maximum a *Gasthörer* (guest listener) may attend. The programme is specifically for *Gasthörer* and it is not the course content university students would receive. There are no formal university entrance requirements.

The *Universität Ulm*, which has a section for Third Agers (Menschen im dritten Lebensalter), explain in their general information sheet, *Zum Gasthörenden-Studium* (2004), that students have to enroll as *Gasthörer*. The charges are €51.13 per semester. Students have to meet entrance requirements for university studies. They can attend a variety of lectures but they must be the ones stated in their handbook: "For *Gasthörer* only". They are not allowed to sit for examinations; they can, however, obtain a certificate of attendance at the end of the semester.

Many universities in Germany offer an endless variety of *Gasthörer* programmes for post-working-life people. Some of them are for those beyond 45 years, some specifically for retirees. The variety appears to be endless.

The Comenius Universität Bratislava, in the Slovak Republic, according to their "Basic information website", is located in the Rector's office at the university, and coordinated and operated by the department of continuing education. The list of courses they offer is extensive. They offer three-year interest groups study in more than 20 study branches. The study plan of each year provides for 14 three-hour lectures per fortnight. In their first year students are offered basic lectures, while "Their second and third year is devoted to the study of optional disciplines and in the following years they enroll in the study of specialised branches." After completion of their studies students are presented with diplomas. The annual registration fee is 900.00 Slovak Crowns. Students have to meet entrance requirements but special exemptions are available (Hrapkova, 2004).

In the Netherlands, according to Snijders (1995), universities offer separate courses for older people within the university structure. The courses offered usually consist of two lectures per week for a ten-week period. There are financial problems since the U3A (called HOVO) is not legally a responsibility of the universities. The support given is mainly through the free use of facilities. Costs mainly have to be covered by the fees the seniors pay. As Snijders (1995) says, "Higher education laws are actually discriminative against older citizens."

A number of the programmes offered deal with gerontology, with aspects of old age. This differs from the philosophy of the British U3A model, Elderhostel and the Institutes of Learning in Retirement, where a positive approach "…is based on the view that courses that deal with aging teach people to be old" (Peterson, 1983, cited in Manheimer et al., 1995: 55). The main similarity of all the French model U3As is that they are university controlled, including the administration, the curricula and the teaching. There is a limited time that students can attend classes, and it is not an all-year-round study situation.

2.2.5.2 The British U3A Model and Variations

The British model U3As have retained the original pattern. They are not controlled by the administration of traditional educational institutions; classes can be conducted throughout the year, as they are not bound to a rigid university timetable. The programmes have remained learner-directed. Lecturers do not receive remuneration; volunteers do all the teaching. The U3As are totally independent, and a democratically elected management committee of members runs each one. There is no paid administrative staff. The timetables are flexible, the curricula are negotiable and so are the teaching styles (Swindell and Thompson, 1995: 433).

Yenerall (2003: 706) differentiates between the two models from a teaching and administrative point of view. He maintains that in France the programme was created by academics from the participating universities, and that regular academic faculty teach the courses. The total organisation "appears to be a 'top-down' arrangement," while the

British model “embodies a culture of mutual aid and voluntarism, . . . this appears to be more a ‘bottom-up’ model of administration.” There are no academic constraints, no examinations and no entrance requirements. Most importantly of all, the fees are low and affordable for all and courses are conducted throughout the year. British model U3As are found mainly in the UK, Australia, New Zealand, and South Africa.

All South African U3As follow the British model. The Johannesburg U3A was launched in July 2001. Nine months later, in March 2002, they had over 500 registered members (U3A Johannesburg, 2002); this increased to over 800 by 2003 (U3A Johannesburg, 2004a). In 2004 they were offering 27 different courses (U3A Johannesburg, 2004b). The annual fee for members is R25.00. This allows access to all courses. Some of the courses are conducted in private homes. The only limitation for attendance is classroom space. Course design and way of operating is by common consensus. There is strong emphasis on participation and involvement. As stated in the Johannesburg U3A brochure (2002): “U3A learning is for pleasure. No qualifications are required for admission and none are given, since fellowship, and love for learning are the essential features here.” The same applies to the U3A in Pretoria, which was launched in 2002, according to the South African U3A website (U3A Pretoria, 2004b). Membership subscription fees are the same as the Johannesburg U3A, and their members have access to the 27 courses the U3A offers (U3A Pretoria, 2004a). The U3A in Cape Town and the one in Durban follow the same pattern. The U3A in Durban is offering 23 different courses; some of them short courses (U3A Durban, 2004).

While, apart from the UK, most European countries follow the French model, the U3A in Almeirim, Portugal (*Universidade Sénior de Almeirim*) follows the British model. According to their website activity sheet (2004), there are no entrance requirements, no examinations, and “the teachers are voluntary . . . chosen according to their academic or professional merit”.

2.2.5.3 Hybrid U3A Models and Third Generation U3A Models

There are some U3As that have followed or are now following a different path, and do not strictly adhere to either the French or the British model.

In Finland, educators started with the U3A (UTA) movement in the 1980s. They created a 'cultural hybrid' organisation, which partially followed the French and partially the British model. As Hietaluoma writes, "Here the U3A institution would be affiliated with a university programme, would use university resources, but would rely heavily on 'local learning groups' of older Finnish students to define the curricula to be implemented on a semester by semester basis" (Hietaluoma, 1999, cited in Yenerall, 2003: 706). There are UTA programmes conducted at nine institutes of higher education. Yenerall (2003: 703–704) traced the "creation of the University of the Third Age in Finland from seeds sown in France and England during the 1970s" from existing literature, and field observations and surveys.

Yenerall (2003) studied the educational interests and behaviour of Finnish students of several U3A programmes. He interviewed administrators and describes the unique features of Finland's U3A as a system which is neither a pure French nor a pure British model design; Yenerall (2003) and Hietaluoma (1999) regard it as a hybrid model. The U3As are on university campuses, and use lecture halls, classrooms and other university facilities. They also make use of "university lecturers and graduate students who serve as seminar leaders and lecturers" (Yenerall, 2003: 706).

The difference to the French model is that curricula are designed by using the interest of the older learners themselves; it is essentially a cooperative approach. There is an open door policy, and there are no particular educational entrance requirements. It is not possible in Finland to obtain a degree from U3A, but it is possible to obtain credit for certain courses (Yenerall, 2003: 707). A national advisory board coordinates the U3A activities in Finland. State allocations and student fees finance the U3A programmes. Students pay 100–200 Finmarks per semester but can only attend classes bi-weekly for

two to three hours. If they participate in certain seminars or research groups, they have to pay another 100–300 Finmarks (Hietaluoma, 1999, cited in Yenerall, 2003: 707).

Lemieux (1995) describes what he calls a third generation of U3A curriculum models, designed specifically to meet the needs of well-educated, retired adults who are seeking course credits and, in some cases, university degrees. *L'Institut Universitaire du Troisième Age de Montreal*, Canada, offers an interdisciplinary programme that awards an "Interdisciplinary Certificate in Education for the Elderly" which can continue on to a "Bachelor degree by Cumulative Certificates" (Lemieux, 1995: 339). There is a strong action research emphasis, in which seniors themselves are the agents of research, rather than merely its subjects. Entrance requirements are appropriate former studies of self-taught knowledge.

In China, the government has created a network of Universities for the Aged, of which there were 400 in 1994, in order to help older adults "adapt to social change" (Swindell and Thompson, 1995: 434). While some resemble universities, giving examinations and awarding degrees, most are affiliated with local recreation centres or located in schools in the smaller villages. The details about China's U3As and the number attending them differ in the following three studies, but they present an interesting picture.

Wolff (2000: 83) remarks that "China has by far the largest program of learning for the elderly. The University of the Third Age has 15,000 campuses enrolling one million people . . . The government has an ongoing publicity campaign to retain traditional values, including respect for the elderly."

Savukinas, Jackson and Caiwei (2002: 165) provide an interesting insight into the University of the Third Age (UTA) movement in China, which started in 1983 and has spread rapidly throughout the country. By 1999, the number of UTAs in China had reached 16,676, and more than 1.38 million seniors were studying at them. UTAs have been supported and encouraged by the Chinese government: "The Law of the People's Republic of China stipulates that the elderly have the right to continuing education"

(Savukinas et al., 2002: 166). Most of the UTAs are established, operated and financed by the government, but some are set up by the private sector. “Normally, a UTA is different and separate from an ordinary university; it has its own classrooms, and the courses offered are designed with the interests and demands of the senior students in mind” (167).

According to Baoku (2002), the Chinese people, with a cultural history of 5000 years, had the idea of “lifelong learning” from the very beginning. Indeed, a Chinese proverb says, “Never stop learning in your life.” China has now more than 19,300 universities or schools for older people, with about 1.81 million senior students.

Taiwanese U3As do not follow the British or French U3A model. There is no control by universities, nor are they self-help organisations. Huang (2003: 161), in his comparative study of Taiwan and British U3As, found that in Taiwan the U3As (called CCSYs) are established and managed by local governments; they do not get assistance from established universities or colleges: “Financially, they are mainly supported by social service departments of local or central governments.” Teaching is carried out by professional teachers; it is not a peer-teaching situation as in British U3As. Curricula are designed mainly by teachers and controlled by administrative staff. The teaching style is instructor-centered. They highlight the importance of meeting older adults’ needs for spiritual development. However, “CCSYs are seriously affected by the sources of funding, particularly the middle and small CCSYs. Courses are conducted in their own accommodation or in rented or loaned public spaces” (Huang, 2003: 251). Taiwanese CCSYs do not require entry qualifications.

2.2.5.4 Elderhostel

The Elderhostel movement has retained its original principles, offering inexpensive learn-and-travel programmes for adults 55 and over. There is a marked difference between the University of the Third Age, the Institute of Learning in Retirement, and the Elderhostel programmes; the latter presents a very different structure. Moody’s (2004) opinion is that

the Elderhostel movement, though legally a not-for-profit organisation, operates on a free market model. Elderhostel programmes are one to three weeks long, constituting organised but informal learning activities, which may involve travel, either domestic or international.

Anyone over 55 can become a member, as there are no academic admission requirements, no examinations, and no credits are awarded. The cost of programmes varies. A programme in New York for five days is US$500.00 per person (Elderhostel Inc., 2004a). This compares with AU$20.00–30.00 per member for one year of classes at a U3A in Australia. The five-day Elderhostel programme does, however, include accommodation. The two models are indeed very different.

2.2.5.5 Institutes of Learning in Retirement

The Institutes for Learning in Retirement (LIR) are not travel programmes and they differ greatly from the Elderhostel programmes. There are, however, similarities with U3As. They are self-governing organisations, with full autonomy to make decisions about their courses.

Moody (2004), who compared all three models (Elderhostel, Institutes for Learning in Retirement, and Universities of the Third Age), found that Learning in Retirement Institutes in the USA are similar to Universities of the Third Age as they are "based on a mutual-aid model that largely bypasses the marketplace and provides a very informal approach to teaching and learning for retired persons". Or, as Midwinter (1996, cited in Moody, 2004) writes: "In the British approach, the U3A is much closer to the LIR model in the USA, consisting of older people who join together both to learn and help others to learn."

Swindell and Thompson (1995: 440) agree that there are aspects of IRLs in common with the French and British models of U3As. Clark et al. (1997) and Simon (2001) make a similar assertion: "Unlike the Elderhostel model, LIRs are based strongly on a mutual-aid

philosophy: ‘peer learning’, where participants themselves are both teachers and students” (Clark et. al. 1997, and Simon, 2001, cited in Moody, 2004).

Minichiello (1992, cited in Moody, 2004), who researched the similarities between the U3A (British) movement and the ILRs, comes to the conclusion that there are impressive similarities between the organisations. Both are ‘agency-oriented’, initiated by the members, and not controlled by academic authorities. Despite variations in different national contexts, Picton and Lidgard (1997, cited in Moody, 2004), found that “the underlying principles of the U3A movement remain the same, and despite a different historical origin and trajectory, the American LIR model follows much the same principles”. These principles, according to Moody (2004), were best enunciated by Peter Laslett, without doubt the most articulate theoretical voice of the U3A movement: “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.”

The British model U3A is similar to LIRs as they both follow Peter Laslett’s idea; the difference, however, is that the British model U3A has kept its distance from the official bureaucratic college/university system.

2.3 BARRIERS TO PARTICIPATION IN LIFELONG LEARNING FOR OLDER ADULTS

As documented in an earlier part of this study, there are barriers that may prevent older adults from participating in learning activities. The elderly are frequently portrayed as economically disadvantaged and a burden to society. Stereotypical images of the elderly widely persist. A common belief that older adults are too old to learn may have a negative impact on their self-image and their willingness to seek educational opportunities. As Lamdin and Fugate (1997: 37) recognise, “negative stereotypes of aging have their most devastating impact on the public perception of the mental abilities of the old”.

Public attitudes about aging are still uninformed and may encourage discrimination (Carlton and Soulsby, 1999: 70). For some researchers and observers, the primary barrier to participation is one of attitude: “In a society in which a biological model of older age as a time of physical decline and decay dominates, and in which psychology offers a similarly negative analysis of cognitive change linked to chronological age, it is perhaps unsurprising that older people may not feel inclined to take up traditional learning opportunities” (Gaskell, 1999: 266).

Cognitive factors are the most frequently cited in the late life education literature as either barriers to participation in education, or as features of older adults’ approach to it. It is a common cliché in the wider world that older people have difficulty with memory and problem solving. This perception is fuelled by images of the elderly in the media, and even the many presumably clearer heads in the academic community may have been susceptible to this conventional belief. The elderly are seen as senile or ‘losing their marbles’. Langer (1989, cited in Lamdin, 1997: 36) calls it “entrapment by category”, or “mindlessness”. The elderly internalise these myths and act in accordance with them (37). Lamdin (1997: 50) maintains that “Barring physiological complications, people can and do have the ability to continue learning well into extreme old age.” Certain compensatory factors, including the accumulation of knowledge and experience and the persistence of curiosity, give the elderly the ability “to put new information into a broader more meaningful context; . . . it gives older learners an equality and potential superiority over younger cohorts”.

Strauss (2000: A11) quotes gerontologist, Murray West. stating: “While there seem to be new headlines every week about the latest brain research on the young, there are also studies underway on brain development in the elderly. The latest studies suggest that new brain cells grow throughout one’s life, even at age 90.” As discussed below, this new information suggests that a society will do well to provide older adults with opportunities to keep their brains active.

Lack of awareness may be one of the most difficult barriers to breach. It may simply be that many older adults fail to realise that there are reasons and opportunities to continue formal education. Within the community there appears to be a lack of awareness of both the existence of learning opportunities targeted to their demographic characteristics, and of the benefits of learning for their age group. Hiemstra (1994) and Peterson and Masunaga (1998) are among those who maintain that lack of awareness of learning opportunities is one of the main obstacles, and that advertising the potential value of participation in learning would make the older population aware of the benefits. Governments generally neither advocate nor provide lifelong learning programmes beyond the point of retirement from the workforce. McDonell (1998a: 9) refers to this as "foolishly short-sighted": "The community as a whole would benefit from a policy of encouraging the habits of lifelong learning on the understanding that this is a process that can continue, with community support, beyond the point of retirement and, indeed throughout life." The cost of formal education programs in Australia at universities and in the TAFE sector is so high that the majority of third age learners are unable to afford them: "the cost barrier for many who might contemplate taking a formal course can be insurmountable" (Dale, 2001: 791). PAHO (1998: 2) maintains that "governments need to revise their thinking: an aging population is a resource not a burden – but it will become a burden unless policy and investments are focused on the capacity of older people".

Low formal educational background and perceptions about learning and social class may contribute to negative attitudes towards learning in later life. The present cohort of retirees did not grow up in a climate where high school and university education were achievable by many. Writing in the overall context of the educational system in the UK, Gaskell (1999) has observed that a cohort's persona, which has been formed by common experiences in early schooling, has more to do with the motivation to seek education in later life than the mere habit of schooling.

Gorard, Rees, Fevre, and Welland (2001: 172) found that early experiences in school tended to predict participation in education in later life. This is a persistent theme in the

literature. In a NIACE survey (1999) it was found that “social class continues to be the key discriminator in understanding participation in learning,” and the length of initial education continues to be the best single predictor of participation in adult learning. A number of studies have indicated that the educational background of the current third age cohort is generally low, but that those who are engaged in learning are better educated. While there are many educational programmes dealing with every imaginable subject, Merriam and Caffarella (1999: 79) maintain “that the vast majority of adults attracted to continued learning are already well educated, middle class and white”. Generally, the higher the level of formal education, the higher the likelihood of participation (Peterson, 1983, cited in Swindell, 2002: 423). This may explain why a large number of elderly people do not participate. The over-60 group, the silent generation, were children during the Depression and World War II. For many during that time, education was a luxury they could hardly afford.

Schuller (2002: 15) states: “Enabling older people who have never participated in education since leaving school to perceive the benefits of learning four, five or six decades later is not easy.” In his examination of participation in formal educational programmes by older adults in Austria, Kolland (1993) also found that the concept of lifelong education was not generally well accepted, and that older students had less formal education than younger students. He found that the attitudes of older adults were influenced by the social aspects of the learning environment, including instructors’ attitudes and the wider social context.

Indeed, negative experiences in early schooling may linger a lifetime. Jones (2000: 343) addresses what he calls “the threshold problem”, referring to aversion to learning and those who will not expose themselves to the ‘pain’ of learning unless they are very determined or the learning environment has certain characteristics designed to reassure them. The problem stems from earlier school experiences, presumably negative ones, and he believes that a change in attitude is the real challenge for older learners. Jamieson et al. (1998: 222) found that once people get over the threshold, they find that the experience can be an eye opener which gives them the confidence to continue.

Previous experiences at school often determine attitudes to lifelong learning. As Stuart-Hamilton (1998: 67) identifies, “we are what we are because of what we were,” referring to the experiences of childhood and earlier adulthood that shape attitudes toward education, and play a significant part in older adults’ willingness to participate in education in later life. The nature of traditional learning environments may constitute a barrier for some individuals. The school system during that time was more rigid, students had to be punctual and well prepared, they could not criticise teachers, and corporal punishment was still accepted.

An effective learning environment for the older adult must meet some specific criteria. Purdie and Boulton-Lewis (2003), in a pilot study, reviewed a sample of individuals aged 70 and older, who identified a wide range of problems, some of them physical, some mental, some social, and some personal, which prevented them from seeking educational opportunities. A number of academic observers have commented that if institutions, policy makers, and governments want to increase the participation of older learners in educational programmes, they will need to consider the perspective of the learners first (Jamieson, Miller, and Stafford, 1998, among others). For institutions, this means designing access to the learning environment itself with older adults in mind, and becoming aware of potential cognitive and sensory difficulties, as well as the psychosocial aspects of integrating into a learning environment.

Learning style also influences the setting in which individuals choose to learn, the subjects they choose to study, and their overall approach to learning. The term, learning style, refers to “the manner in which students consistently respond to and process information in a learning environment” (Truluck and Courtenay, 1999: 223).

In a U3A environment, some instructors may lack training in understanding and meeting the learning needs of older students. Tutors’ attitudes to teaching may reflect the old traditional style of teaching, the kind that many older individuals experienced in their own youth. This may not be suitable for today’s elderly learners (Cusack, in Glendenning, 2000: 65). Such an approach may fail to compensate for specific problems

brought to the classroom by aging, and it may bring back negative images of earlier school experiences for some older learners. These problems can further reduce the confidence of a population already plagued by a negative educational self-image. As possible reasons why the participation rate is so low in the French U3A model in Malta, Formosa (2000: 323) states: "Valetta U3A is grounded in mainstream and traditional models of educational practice which equate education as one-way flow of information from teachers to students." Formosa also maintains that the programme best suits older persons who have an adequate level of education and that the courses offered are based on assumed needs and interests of older persons. The latter aspect should not be a reason for non-participation in Australian U3As, as the teachers are U3A members and not members of the university faculty. Hence, they would understand the needs of their fellow members.

Providing appropriate facilities remains a problem for many U3As in Australia. Typically they do not have their own premises, many of them relying on borrowed space designed for other organisations such as local governments, technical institutes, schools and churches (McDonell, 1998a: 11). This does not always produce the best environment for the older learner, who may have mobility issues, hearing or vision problems, or other specific needs.

To summarise, there are a number of barriers that may prevent older adults from learning. As Cross (1981: 82) mentions, understanding the barriers to learning is important because "it is usually the people who 'need' education most – the poorly educated – who fail to participate".

2.4 CONCLUSION

Several methodological issues emerge when reviewing this topic from the perspective of several relevant disciplines. The field of third age educational literature has suffered from difficulties in formulating overall research design; problems recruiting appropriate project samples; vague definitions leading to the inconsistent use of terminology; and an

unfortunate lack of interest in the topic within the traditional arena of educational research.

There are problems with researchers' overall approach to the subject. As Jamieson et al. (1998: 216), among others, have observed, researchers "cannot easily capture the complexities of aging-related phenomena through conventional . . . research methodologies". Even today, there is no solid database available for quantitative research. However, there have been several attempts to establish such a database, such as the longitudinal Australian study of old age referred to earlier in this review (Andrews et al., 2002: 761–762).

Many in the field of gerontological literature believe that aging should be explored from the perspective of the older adult. From this perspective, perhaps the most promising attempts to date employ a phenomenological approach, such as that used by Fisher and Specht (1999). Another promising approach uses biographical or life history data drawn from individuals through carefully structured interviews in order to construct a life course perspective. There are well-established protocols within this methodology for identifying themes and other data clusters from participants' narratives, and drawing conclusions based on these types of data.

A second weakness in third age learning research in this area has to do with issues of sampling. A number of study participants have been recruited from health-related facilities, and community-based social services agencies. As a result, health problems and disabilities tend to predominate among the participants, possibly distorting any conclusions regarding the psychosocial aspects of late life education. At the other extreme are those samples drawn from community-dwelling adults, such as in the study conducted by Ryff and Heidrich (1997: 193–194). In that case, the group of older adults recruited for the study had a median age of just over 73 years. All of the participants self-rated their health as good or excellent compared with others of their age and gender, and all rated their financial status as "generally good". Further, the participants in this sample were highly educated – the mean achievement was four years of college. This sample is

in stark contrast to others recruited from health-related facilities and the community, where individuals are likely to be in poorer health, less well off financially, and less well educated. In the same way, use of this sort of sample can distort findings.

While much has been published in the popular media and the academic press about successful aging, there is still a lack of consensus among researchers as to the meaning of the term. This lack of clear definition has hampered research into education in later life in a variety of ways. First, without a common vocabulary, researchers have difficulty designing studies with clear objectives. Second, societal norms related to aging are in the process of change, so that relative terms like successful are problematic in serious research.

As previously stated, when using the key words: education, aged or aging in an Internet search, most references have to do with teaching older adults about changes in their physical health, and most articles appear in medical, nursing, social work, and psychological journals. The general thrust of these articles is that older adults must be taught to adjust to aging, in a general reflection of the loss perspective of aging. There is a growing body of literature on the cognitive and psychosocial aspects of aging, however, and it is possible to detect in the more recent literature a growing interest in what factors, besides physical health, influence older people's sense of how old they are.

Nonetheless, some progress has been made in recent years. Researchers know more about adult development than they previously knew, particularly because more work has been done from a life span or life course perspective. This work has been possible because of increased longevity and because there are many more people living in the third and fourth ages who are available for study. As social norms change, and it becomes more common to investigate the psychological processes that animate older adults, we can expect to learn even more about aging, and about the aging mind.

In spite of the upswing of interest by gerontologists, lifelong learning after completion of one's working life still appears to be of little interest to those educationists. The

International Handbook of Lifelong Learning (Aspin, Chapman, Hatton, and Sawano, 2001), for instance, contains 40 scholarly articles by educationists spread over 820 pages; while a few of the authors mention older adults and the need for learning opportunities, there is only one article specifically addressing learning in the third age, or after retirement (777–796).

Education for adults, particularly older adults, is however beginning to become a serious social, political, and economic enterprise, as notions of retirement change along with other conceptions of the social patterns of life. At the same time, researchers and social scientists are beginning to look closely at the concept of leisure as it has traditionally been understood. When these terms are redefined and more generally accepted, education for older adults may really mushroom. The studies agree that older adults are interested in learning long past the age when social norms dictate that they should have lost interest. Many want to learn simply for the sake of learning, others because of the social contacts they can achieve by joining a community of learners, and still others want to learn so that they have a purpose in life.

Accepting the willingness of older adults to participate in education, it becomes important to consider what kind of educational models best serve their interests and goals. The U3A concept, especially the British model, is increasingly popular in a number of countries, including Australia. It has appealed to a wide variety of people with its peer structure and community orientation, and is accessible and affordable.

Colleges and universities in the US are also beginning to see that welcoming older students to their campuses, while it may change the face of the student body, may also bring unexpected benefits. A number of universities and colleges in the US have provided entrance to courses free or at reduced fees for persons above age 50 or 60. Among them are San Francisco State University (2005) and Jackson State Community College (2005). There has been little emphasis on attracting older adults (especially over 60) to university campuses in Australia. The fees are exorbitant, and reductions in fees for the elderly do not appear to be available.

Older adults are being studied for more than their interest in learning later in life – researchers also want to know about the relationships between self, identity, and learning at an advanced age. They want to know what makes for successful, positive old age, and are investigating the relationships between learning and well-being, to cite one example.
The issue of gender in late life education has attracted interest, possibly because it is clear that so many more women than men have been attracted to educational programmes. That there are more women living longer than men does not quite explain this phenomenon, nor have researchers yet untangled the specific motivations of women who seek learning in late life. Williamson (2000) gives some insight into this phenomenon by addresses the imbalance in one of the U3As in New South Wales, Australia.

Finally, because this field of study is still struggling to find its identity within the academic community, and because social attitudes toward older adults are slow to change, along with the negative stereotypes that have accrued to them, researchers have been hampered by flaws in the design and execution of empirical investigations. There are problems with sampling, with terminology, with various biases perhaps yet undiscovered – yet the discipline continues to evolve.

The field of late life education is still in its infancy. There is a wealth of information and research available from sources outside of adult education: from medicine, nursing, social work, psychology, and even sociology. However, until the field sees itself as somehow distinct from these well-established disciplines, it will not fully come into its own.

CHAPTER 3: RESEARCH DESIGN

3. INTRODUCTION TO AND RATIONALE FOR THE STUDY

This chapter specifies the aims and research questions of the study, and develops the rationale for the use of a descriptive research design using quantitative methods of data collection. The chapter describes the construction of the research questionnaires and the principles underlying their construction. The chapter concludes with a description of the analysis used.

3.1 PROBLEM FORMULATION AND AIMS

This study focuses on the learning needs of the older population, with particular emphasis on the role of the University of the Third Age in promoting lifelong learning. In the light of the need for the provision of lifelong education for older adults, as detailed in previous chapters, I have documented the evidence that suggests the benefits resulting from the provision of educational opportunities for older adults (Pinquart, 2002b: 90; Ryff, 1989; Seiffert, 2002: 9; Swindell, 1999: 235–247; and others).

The research aims and basis for the methodology have been introduced in the literature review. The content for the questions on the surveys emanated from the research literature on older adult learning. Swindell (1999) made a questionnaire available which he had used for his research. As this study differed from his, I only adapted three of the demographic questions for this study.

The following section clarifies the most important barriers to participation and the consequences to individuals and society of failing to provide learning opportunities to the older adult population. The latter have been introduced and documented in Chapter 2 of this study (Price and Lyon, 1982, cited in Kolland, 1993: 535; Lim, 1988; Anstey et al., 2002: 74).

Older adults comprise the fastest growing sector of the population in Australia. The state of Victoria has a total population of 5 million (ABS, 2004: 26–28), of whom 1,176,421 are 55 and over. As documented earlier, the development of U3As has been rapid over the past 20 years. In 2004 there were 53,456 members in Australia, and of them 17,258 were enrolled members of U3As in Victoria (U3A Network Victoria, 2004). This amounts, however, to only 1.47 percent of the 55 years and older population of Victoria, 24 percent of them male and 76 percent female. As McDonell (1995: 3) stated, "U3As have become Australia's fasted growing educational movement." While the growth of U3As has been remarkable, the total membership in 1998 only comprised about 1.5 percent of the total retired population of Australia; this could be significantly increased if some of the associated problems could be solved (McDonell, 1998b, cited in Dale, 2001: 791). Meanwhile, Swindell cites a lack of volunteers, tutors and administrators as the main deterrent to future growth (1999: 24).

This research moves forward from these previous studies. The broader research aims are:

i) To describe educational models available to older adults and the barriers preventing older adults from participating in lifelong education, and to identify the more important causes of gender imbalance that is a common feature of such programmes, with special reference to the educational needs of older men.

ii) To investigate the views of a sample of U3A members and the presidents of U3A branches in Victoria, Australia and to determine how views of them differ by means of an empirical investigation.

iii) To make recommendations based on the study to improve the educational provision of U3A and encourage the participation of older adults, especially men, in its programmes in Australia.

3.1.1 Research Questions

Given the investigative nature of the study, several research questions have been formulated rather than hypotheses. The following more specific questions were addressed through survey data and quantitative analysis:

i) What educational models are available to older adults?

ii) What do current U3A members feel are the most important contributions of participation in the U3A to the lives of older adults, and what are the most significant barriers to participation?

iii) Do male and female members of the U3A have significantly different perceptions as to the contributions of the U3A to the lives of older adults and the barriers to participation?

iv) Do current members and U3A presidents perceive the benefits and barriers of the U3A in a significantly different manner?

v) Are there any other factors which significantly contribute to different perceptions of the benefits and barriers of participation in the U3A?

vi) What are the more important causes of the gender imbalance that is a common feature of such programmes, with special reference to the educational needs of older men?

vii) What recommendations can be made, based on the findings, to improve the educational provision of U3A and encourage participation of older adults, especially men, in its programmes in Australia?

3.1.2 Methodological Approach

There are generally two types of research approaches, qualitative and quantitative, that can be used to collect data in the educational field. For this study the quantitative approach has been used. The difference between the two approaches is stated by Patton (2002: 226): “Qualitative methods permit inquiry into selected issues in great depth with careful attention to detail, context, and nuance; . . . Quantitative instruments, on the other hand, ask standardised questions that limit responses to predetermined categories (less breadth and depth).” This study takes a quantitative approach. Quantitative data make it possible to measure a very large sample using a limited set of questions and facilitating comparison and statistical aggregation of the data, producing a broad, generalisable set of findings (Patton, 2002: 14). For quantitative research, validity is the important factor. Validity depended upon careful instrument construction in order to ensure that the instruments in this study, the two questionnaires, measured what they were supposed to measure.

3.2 POPULATION / GENERAL DESCRIPTION OF SAMPLE

The target population for this study is older adults who are involved in lifelong learning at the Universities of the Third Age in Victoria, Australia. The accessible population from which samples have been drawn are the U3A members of two of the 68 U3As in Victoria and the presidents of the 68 Universities of the Third Age in Victoria.

The samples for this research consisted of the following groups of individuals drawn from the populations described above.

Two groups were surveyed by questionnaire:

- Members of two U3As in Victoria, Australia
- Presidents of the 68 U3As in Victoria, Australia

3.2.1 Sample for the U3A Member Questionnaire

It would have been time-consuming, geographically difficult and expensive to conduct surveys of all U3As in Victoria. As a result, this study surveyed all members of two of the 68 U3As in order to collect quantitative data. The two U3As have a combined membership of approximately 1 000 individuals. “With both qualitative and quantitative data, the essential requirement is that the sample is representative of the population from which it has been drawn” (Cohen et al., 2000: 95).

The two participating U3As are representative of the broader target population (comprising all 68 U3As in Victoria). One is situated in the north-eastern area of the city of Melbourne, while the other is situated in the south-east, at a greater distance from the centre of the city. Both U3As have mixed membership as is the case in all U3As in Victoria. Before data were collected I presumed that the percentage of male and female membership would fall within the usual U3A membership ratio of about 24 percent males

to 76 percent females. As with other U3As, the membership numbers change from term to term or semester to semester.

In order to compare well with other U3As it was important that the samples for this research come from well-established U3As. Both of the chosen U3As were established more than ten years ago. Like most U3As, they have an extensive list of courses they offer on a semester or term basis. Both U3As conduct their courses in rented buildings for which they pay a minimum fee (one rented from the local authority, one rented from a TAFE). Some courses are conducted in other premises or even in private homes. The same applies to most U3As, as very few have their own premises (accommodation).

Among the 68 U3As in Victoria there are a few which are rather small and were not suitable for the research. Others have only existed for a very short time, and have a number of growth problems; they would also not have been suitable and representative for the broader target population of the study.

In addition to concerns about whether the universities chosen are representative, there were also two other considerations taken into account when choosing the sample. First, the U3As selected had to be willing to participate in this study and prepared to cooperate and endorse participation by members. Several committee members of some of the U3As with whom I had informal discussions were not enthusiastic about participating in such a project. Secondly, they also had to be accessible to the researcher. One U3A is about 45km from my residence and the other one is 20km. I contacted presidents and secretaries of both U3As before commencing with the study. They agreed that I could, at a later stage of the research, have discussions with them and their management committee in order to explain the purpose of the study prior to data collection. However, changes to the arrangements had to be made before the survey was eventually distributed. This included the original intent to discuss the survey with the committee, and a change in the supply of membership address lists; the details are provided in section 3.3.2.

3.2.2 Sample for U3A Presidents' Survey

All U3As are autonomous organisations and all have annual elections when presidents and members for the management committee are elected. The presidents (68) of the management committees of all of the 68 U3As in Victoria received a questionnaire.

It was envisaged that while the members of two selected U3As completing the member questionnaire would supply personal information and would express their satisfaction and/or problems they experienced at their U3A. The presidents (committee members) would be able to provide an overview of the 68 U3As in Victoria, providing information about administration, teaching and potential problems faced by their respective U3As.

3.3 OVERVIEW OF RESEARCH INSTRUMENTS

3.3.1 U3A Member Questionnaire

A survey methodology was used to obtain information from U3A members. It was envisaged that the sampled U3A members would be able to provide important data on benefits they have experienced, barriers to participation, gender imbalance problems, and in general terms how their U3A membership has contributed to their lifelong learning aspirations.

Cohen et al. (2000: 269) identify the advantages of questionnaires compared to interviews, and maintain that a questionnaire "tends to be more reliable; because it is anonymous, it encourages greater honesty; it is more economical than the interview in terms of time and money; and there is the possibility that it may be mailed". The disadvantage, on the other hand, is that there is often too low a percentage of returns. The questionnaire return rate for this study was high, as documented later in this chapter.
For this study, several strategies were initially planned in order to maximise the return of questionnaires, but, as detailed later, some of them could not be put into operation due to

timing and other factors. All members received the questionnaire by ordinary mail as not all U3A members are connected to the Internet. At the top of the questionnaire was an explanatory note stating not to put a name or an identifying remark on the questionnaire in order to safeguard anonymity. Cohen et al. (2000: 61) remark on anonymity as follows: “The essence of anonymity is that information provided by participants should in no way reveal their identity. . . . Thus, a respondent completing a questionnaire that bears absolutely no identifying marks – names, addresses, occupational details, or coding symbols – is ensured complete and total anonymity.”

The target group also received an explanatory letter and a self-addressed and pre-stamped reply envelope with the questionnaire. Cohen et al. (2000: 259) explain the purpose of the covering letter as follows: “to indicate the aim of the research, to convey to respondents why the completion of the questionnaire is of value, to assure them of confidentiality, and to encourage their replies”. While StatPac (2006) even goes so far as to say: “The cover letter is an essential part of the survey. To a large degree, the cover letter will effect whether or not the respondent completes the questionnaire.” The participants were asked to return the questionnaire within one week.

In the explanatory letter I mentioned my interest in U3A activities and that I have been a U3A member at one of the U3As in Victoria for the past 15 years. I also mentioned that some of the findings of this study might be of benefit to the U3As. Cohen et al (2000: 128) suggest that “stressing the importance of, and benefits to, the client group being targeted” helps to increase the response rate.

For this research the questionnaire was pilot tested, as documented later in this chapter, in order to ensure that wording and content were appropriate. According to De Vaus (2002: 123), postal questionnaires rely on respondents understanding and answering the questions. Thus, easy-to-follow questionnaires are important where the meaning of the questions is self-explanatory.

As far as the design of the questionnaire is concerned, Charles and Mertler (2002: 162) state: “Questions used in surveys are sometimes open-ended but more frequently are accompanied by response choices pre-selected by the investigator.” For this study the majority of questions were structured, but several questions were open-ended, to enable the participants to respond in their own terms. According to Cohen et al. (2000: 247), “there is a simple rule of thumb: the larger the size of the sample, the more structured, closed and numerical the questionnaire may have to be”. Cohen at al. (2000: 247) also state that highly structured, closed questions are useful in that they can generate frequencies of response amenable to statistical treatment and analysis.

The types of questions and the data gathered in this survey are discussed in more detail in a later section.

3.3.2 Member Questionnaire Distribution

As mentioned earlier I had to make changes to my original plan before distributing the questionnaires. U3A management elections were conducted and changes of presidents and committee members had occurred. While I had permission to go ahead with the distribution of questionnaires to the members of U3A Box Hill, I encountered problems with the second U3A. The president and management committee did not agree with my intention to send the questionnaires to the members by mail. They felt that mail distribution interfered with the personal freedom of their members. Their suggestion was to deposit all questionnaires in the foyer of the U3A and any member who was interested in the questionnaire could pick one up. I could not agree with this proposal, as this type of distribution might have resulted in a sample bias due to:

- Eliminating participation of members who during this particular time did not attend U3A.
- Changing the distribution method would mean different approaches for the two U3As.
- Possible sample contamination by non-members or casual visitors who would pick up the questionnaire in the foyer.

- I would not have known how many members picked up the questionnaire and consequently would have been unable to calculate the response rate.

I had already obtained permission to mail the questionnaires to the members of Box Hill U3A and it would have meant that a different approach would have been used for other U3A. I realised at this stage that it would be necessary to search for another U3A with similar membership numbers. I contacted the U3A Network Victoria and they supported the search. I then contacted the president and vice president of Frankston U3A, situated on Port Phillip Bay, about 50km south-east of the centre of Melbourne. The president and the management committee of Frankston U3A agreed with my proposal of mail distribution.

The other change from the original proposal was that members did not receive information about the survey in their bulletin prior to distribution of the questionnaires. Information sheets are only distributed a few times per year and the timing was unsuitable. In order to provide advance information sheets, I would have had to delay distribution of the survey by three months.

I also did not have the opportunity to discuss the research intentions and detail with the total management committees personally. This was only explained to the presidents and vice presidents and/or secretaries, who then discussed it at their committee meetings.

In light of the changes I had to make, it is interesting to note that the return rate of the questionnaires was quite acceptable, despite the cancellation of some of the strategies I had envisaged to maximise questionnaire returns.

3.3.3 Survey for U3A Presidents

As mentioned previously, all U3As have a management committee headed by the president (chairperson). The presidents of the management committees of the 68 U3As in

Victoria received a questionnaire by mail, including an accompanying letter and a self-addressed, pre-paid envelope.

The surveys sent to the presidents differed from the member questionnaire. The member questionnaire was designed specifically to obtain personal information from the members of the two U3As, and express their satisfaction and/or problems they experience at their U3A, while the survey questions for the presidents asked for administrative information. The 14 survey questions addressed to the presidents are relevant to the research questions stated earlier.

3.4 ANALYSIS

The research analysis was guided by the research questions, as stated in section 3.1.1. The purpose of data analysis was to simplify the data collected so that any patterns can easily be seen and that the underlying influences on these patterns may be revealed. There were two stages in the analysis for this research: pilot testing of research instruments, and post-testing of collected data.

3.4.1 Pilot Testing

The first stage of data analysis was an analysis of the appropriateness of the survey instruments. For this reason pilot testing was undertaken for both the member questionnaire and the survey for the presidents. Cohen et al. (2000: 129) maintain that there is a need "to pilot questionnaires and refine their contents, wording, length, etc. as appropriate for the sample being targeted". De Vaus (2002: 114) also maintain that each question and the questionnaire as a whole have to be evaluated rigorously before questionnaires are administered.

Pilot tests were performed to check item appropriateness, to make certain that the questions are not ambiguous or misleading, and to check the clarity of the questionnaire items, instructions and layout. Before the member questionnaire was finalised, I

discussed the content with eight U3A members and then conducted a pilot study at Casey U3A, where I am a member. I distributed 25 questionnaires to one of the classes and 24 were returned (a 96% response rate). I asked the group to complete the questionnaires and provide information on the clarity of the questions, the overall length, or any other aspect they could think of to improve the questionnaire.

The suggestions I received from the members were valuable and I made several changes to the wording of the questions. One of the suggestions was to include a question on whether members had served as tutors or had been on the management committee; I included this as questions 17 and 18. There were also a few members who added a detailed list of benefits in addition to question 7b, "How much do you feel that you have benefited this year?" As result of this I developed a new question (14), which gives a detailed list of participation benefits and provides for open-ended responses.

The pilot study was also beneficial for other reasons. It made me more critical than I had been before. I also became aware that the format of the questionnaires was not professional enough and the mailing cost of six pages plus the cover letter and return envelope would result in increased postal charges. I therefore decided to have the questionnaires printed using thinner paper and only five pages. The result was a professional looking printed questionnaire.

When the pilot study was completed and the questionnaires printed, they were ready for distribution. To comply with the privacy of members at both U3As I was unable to obtain membership address lists from the U3A management. I prepared 1000 stamped envelopes with a questionnaire, cover letter, a stamped and self-addressed envelope, and took them personally to the U3As. The secretaries had prepared the member address labels, and with the help of two U3A members, the labels were attached to the envelopes and all letters were immediately taken to be mailed. Privacy rules were therefore strictly adhered to.

The presidents' survey was also piloted in a similar manner. Before the content of the survey was finalised it was discussed with one current president, two former presidents, a treasurer, and several committee members. Four of them then completed the questionnaire and there was a discussion on the content. One question dealing with details of income was deleted since it was not relevant. The survey was then sent for review to the U3A office manager at the U3A Network Victoria. Addresses of the 68 U3As were provided and the surveys, with a cover letter and self-addressed stamped envelope, were sent to the 68 presidents by mail.

3.4.2 Analysis of Quantitative Data

3.4.2.1 U3A Member Questionnaire: Description of Data Gathered

The member questionnaire used for this study (cf Appendix A2) covers a comprehensive set of domains focusing on the research questions. It contains a mix of dichotomous yes/no questions, multiple response items, and rank order questions. Cohen et al. (2000: 252) state, "The rank order question is akin to the multiple choice question in that it identifies options from which respondents can choose, yet it moves beyond multiple choice items in that it asks respondents to identify priorities."

The first six questions are demographic questions asking for details about gender, age, educational level achieved, and work they did before they retired. The inclusion of demographic questions early in the questionnaire was seen as a way of making the respondents comfortable, while at the same time obtaining important data. These questions generated independent variables for analysis.

The next section of the survey was used to generate dependent variables for analysis. It focused on such topics as when they became a member of the U3A, and what courses they participated in. There are also questions assessing the benefits they experienced as a result of participation. These questions addressed the heart of this thesis: assessing the contribution that U3As make in lifelong learning for older adults. These questions prompt

answers as to why people join U3A, and what benefits they experience. The survey intended to provide answers to the following questions:

- Is there a difference between the educational level of men and women?
- Do men and women have different reasons for joining U3A?
- Do they experience different barriers before joining U3A?
- Do they experience different benefits from U3A participation?
- Do they look for different improvements U3A could make?
- Do the courses they enroll in differ from those women enroll in?
- Are men more inclined to offer their services as tutors or committee members than women?

The questionnaire also included a question dealing with barriers to participation as this relates to one of the research questions stated earlier.

For the analysis of survey data, basic tabulations of all variables were produced for the member questionnaire. The variables were analysed using the questionnaire categories:

Independent Variables:
Age
Gender
Educational Level
Type of Work Before Retirement
Length of Time as U3A Member

Dependent Variables:
Reason for Joining U3A
Level of Benefit from Courses
Type of Benefit as a Result of U3A Participation
Barriers
Problems with U3A (improvement required)

Whether Served as Tutor
Whether Served as Committee Member

3.4.2.2 Survey for U3A Presidents

The presidents' survey (cf Appendix 3A) was slightly different in scope to the members' survey. Whereas the members' survey sought to test several different relationships between different variables, the presidents' survey sought to explore the demographic makeup and structure of the U3A further. Data from the presidents' survey were used to support the analytical conclusions gained from the members' survey. Accordingly, the presidents' survey generated a number of demographic (independent) variables, such as gender of members, presidents, treasurers and other committee management members, and tutors.

In addition, the presidents' survey also posed a question (dependent variable) about the benefits of participation in the U3A. This variable was used to compare and contrast the views of U3A presidents (committee members) about the benefits of the U3A as compared to ordinary members.

The survey for U3A presidents was a structured instrument with 13 questions, requiring answers to the following questions:

- What advertising is being done?
- Is there gender-specific advertising to attract more male members?
- What are the specific problems – attracting tutors, class room accommodation – that might be barriers to participation?
- What courses are being offered and are there any gender-specific courses?

The last question was an open-ended question asking about the main contributions U3A makes to the lives of its members.

There were also questions about the type and number of courses the U3A offers, the contribution the U3A makes to lifelong learning, and about benefits people experience by being U3A members.

3.4.3 Outline of Quantitative Analysis

Data from mailed questionnaires are suitable for quantitative analysis and the use of descriptive and inferential statistics (Anderson, 1968: 168). I therefore decided to use mailed questionnaires to collect extensive, objective and quantitative data. Analysis of the quantitative data collected from the mailed member questionnaires was conducted, in the main, using the Statistical Package for the Social Sciences (SPSS).

The initial analysis consisted of producing frequency tables and other descriptive tools in order to obtain an overall picture of the data collected. Appropriate statistical tests and comparisons of grouped responses were performed in order to answer the research questions. Cross tabulations and chi square tests of independence were used to test for statistically significant relationships between all categorical independent and dependent variables. The majority of variables included in this study were categorical, and it was expected that the chi square analysis and cross-tabulation of data would be appropriate analysis for this research.

However, the continuous variable of respondent age was also a critical independent variable in this study. Cross tabulation and chi-square analysis are not appropriate for continuous variables. Therefore, inferential tests (t-tests) were used to compare age differences between two groups of respondents. ANOVA was used to test for statistically significant mean differences in age between more than two groups. Tables illustrate these findings. The practical, statistical, or social importance of any observed differences will be discussed in the findings.

The major computer analysis mainly applied to the member questionnaire; much of the analysis of the U3A president/committee survey was tabulated.

3.5 VALIDITY AND RELIABILITY OF THE FINDINGS

As documented earlier, the research sample was representative of the U3As in Victoria. The results of the study are generalisable to older adults who are U3A members in Victoria, Australia.

The instruments used were specifically designed to answer the research questions of this study, yet could be used for any U3A. Others should be able to reproduce similar results if the same surveys are used for other U3As. However, there might be a difference in survey findings from very small or rural U3As, or from those recently established.

As for the representativeness of this research, sample size is an important factor, especially if it is necessary to look separately at different groups, as De Vaus (2002: 83) states: “Make sure that the sample is sufficiently large so when it is broken down into separate subgroups (e.g., age, class, sex) there will be sufficient numbers in each.” In this study the size of the U3A member sample certainly made it possible to analyse subgroups.

Another factor important for validity is the return rate of the questionnaires. There is always the possibility that some U3A members may not want to complete the questionnaire. The approach taken in this research was to make U3A members aware of the importance of the research by asking the presidents and committees for their support in order to make members aware of the importance of the data collection. The personal letter they received would also contribute to a good return rate. These steps helped to reduce the return rate problem. It appears as if the steps taken to obtain a good return rate in this study were successful.

The member questionnaire was sent to 987 U3A members, and a total of 627 were returned, a response rate of 63.5 percent. The survey for the presidents

was sent to 68 of the presidents of Victorian U3As and 55 were returned, a response rate of 80.8 percent.

Cohen et al. (2000: 129) maintain that the disadvantage of using questionnaires can be a too-low percentage return. That is certainly not a problem in this study; the response rate is quite respectable.

As far as the research questions are concerned, it was recognised that the gender imbalance problem might not be answered fully with survey questions alone. Moreover, it was recognised that the present situation where 76 percent of U3A members are female might also be a problem. It was, however, expected that the surveys of members and presidents would give more insight into this question.

3.6 POSSIBLE LIMITATIONS OF THE STUDY

There are several limitations of this investigation preventing generalisations being made beyond the U3A organisations under consideration. There was also not much comparison to be made with other research literature.

This study is supported by the literature in the area of education for older adults. However, as indicated in the literature review, although there is a wealth of information and research available from sources outside of adult education (medicine, nursing, social work, psychology, and sociology), the field of late life education is largely quiet and is still in its infancy. Until the field sees itself as distinct from these well-established disciplines, it will not fully come into its own.

There was information and research available dealing with male participation in education, but again it did not specifically apply to the over 55-year-old age group. There was little research available on education after retirement. The same applies to the ‘feminisation’ of education programmes after retirement. Apart from a study by

Williamson (2000), there was not much research dealing specifically with this aspect of older adult education in Australia.

The findings of this study should therefore provide valuable insight into the educational and other benefits older adults can obtain by being members of U3A. This should support the aim of the study, to illustrate that U3As provide an important contribution to the lifelong learning of older adults. The findings of this study should also have implications for other U3As.

It is hoped that the findings of this study will encourage attempts to increase male participation for the advancement of U3As, as documented in the literature review (Hurworth and Harvey, 2000: iii; McDonell, 1998: 12; and others) and to the well-being of men (Price and Lyon, 1982, cited in Kolland 1993: 535; and others.)

This study does not claim to reach conclusions applicable to all U3As in Australia. I fully recognise that there are limitations to generalising results to the wider older adult population. The study was designed to be exploratory in nature, and it is hoped that this research will be suggestive of future research directions.

CHAPTER 4: RESEARCH FINDINGS

4. INTRODUCTION

The purpose of this chapter is to report, in two sections:

1. The analysis, results and discussion.
2. Further discussion and summary of the findings.

This chapter provides the results of two data collection tools used within the U3A population: the member questionnaire and the presidents' survey. These enquiries were all designed to seek and find answers to the following research questions:

1. Do male and female members of the U3A have significantly different perceptions as to the contributions of the U3A to the lives of older adults and the barriers to participation?
2. What do current U3A members feel are the most important contributions of participation in the U3A to the lives of older adults, and what are the most significant barriers to participation?
3. Do current U3A members and U3A presidents perceive the benefits and barriers of the U3A in a significantly different manner?

4.1 ANALYSIS, RESULTS AND DISCUSSION

As indicated in the previous chapter, the data for this study were gathered through the use of two types of postal surveys, one for U3A members and one for the presidents of the U3As in Victoria. I also refer to the pilot tests prior to data collection and to the changes I had to make to the original plan. The member questionnaire was sent to all the enrolled members of two U3As, while a second survey was distributed to all presidents of the 68 U3As in Victoria.

In the methodology (Chapter 3), I explained how the analysis would be performed. This quantitative data, collected from the two questionnaires, was analysed using SPSS (Statistical Package for the Social Sciences). Cross tabulations and chi square tests were used to identify statistically significant relationships between independent and dependent variables of categorical level data. Moreover, t-tests were used to compare mean differences between two groups of responses and to test for difference in those responses.

4.2 MEMBER QUESTIONNAIRES

4.2.1 Demographic Data

The first section provides the analysis of the demographic data, the independent variables, to provide a background view of the respondents from the two U3As who completed the questionnaires. A total of 987 questionnaires were sent to the members of two U3As and 627 were returned, a response rate of 63.5 percent. The questionnaire consisted of 18 questions. The first five questions dealt with the demographics of the respondents.

4.2.1.1 Return Response

The findings of the demographics will be presented first, as shown in Table 4.1, commencing with gender. Of the 627 returned questionnaires, 23.4 percent of the respondents are male and 76.7 percent female. These results are similar to that of the national average of U3A members, where 24 percent are male and 76 percent female, as documented earlier in this study (U3A Network Victoria, 2004).

Table 4.1: Return response by gender

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	MALE	147	23.4	23.4	23.4
	FEMALE	480	76.6	76.6	100.0
	Total	627	100.0	100.0	

These findings are, however, slightly better than Swindell's (1991: 5) findings, where the average was five females to one male, with extremes ranging as high as ten to one. Williamson (1995: 51) also found in his research in New South Wales a female membership of 80 percent.

4.2.1.2 Mean Age of Respondents

Frequencies for age categories and the mean age of the respondents are shown in Tables 4.2 and 4.3. The mean age for males was 73.28 years, and for females 70.28 years, therefore males tend to be slightly older. There were 607 responses, as twenty of the 627 surveyed members did not complete this question.

Table 4.2: Mean age of the respondents by gender

Group Statistics

	GENDER	N	Mean	Std. Deviation	Std. Error Mean
AGE	MALE	142	73.28	7.249	.608
	FEMALE	465	70.28	7.439	.345

4.2.1.3 Distribution of Ages

An age breakdown for the participants is displayed in Table 4.3. The largest group of members was 44.3 percent in the 70–79 age category. The second largest group was the 60–69 category with 35.6 percent, and then the over-80 group, at 13.7 percent. The

complete code list shows that the two youngest respondents were 51 and 53, while the two most senior study participants were 95 and 96 years of age.

Table 4.3: Distribution of ages

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	<60	39	6.2	6.4	6.4
	60-69	216	34.4	35.6	42.0
	70-79	269	42.9	44.3	86.3
	80+	83	13.2	13.7	100.0
	Total	607	96.8	100.0	
Missing	System	20	3.2		
Total		627	100.0		

The results of Hurworth and Harvey's (2001: 16) study, conducted in Victoria, are close to this study, with 42.9 percent in the 70–79 group but fewer than 10 percent in the >80 group. The age distribution in Swindell's (1991: 5) study, conducted 15 years ago in New South Wales, found a marked difference in the age distribution. There were only 23.8 percent in the 70–79 age category compared to 44.3 percent in this present study. There were 71.2 percent in the below 70 group compared to 42 percent in this study. The most marked difference is in the >80 group, where Swindell's study only indicated 2.7 percent, while this study shows 13.7 percent. NIACE (2002: 3) maintain that their surveys in the UK show "That the number of learners aged 75+ has fallen by a third between 1996 and 2002."

The distribution of age categories has also been analysed by gender, as shown in Table 4.4. The results are interesting. The highest percentage of males and females appears to be in the group aged 70–79, with 48.6 percent of males and 43.0 percent of females belonging to that category. Twenty percent of the males are over 80, whereas only 12 percent of the females are 80+ years of age. The women in this sample tend to be younger, with about 80 percent aged 60–79. A chi-square test shows that these are statistically significant differences [X^2 (3) = 11.820, p = < .008].

Table 4.4: Frequency distribution of age by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
Age category	<60	Count	4	35	39
		% within GENDER	2.8%	7.5%	6.4%
	60-69	Count	41	175	216
		% within GENDER	28.9%	37.6%	35.6%
	70-79	Count	69	200	269
		% within GENDER	48.6%	43.0%	44.3%
	80+	Count	28	55	83
		% within GENDER	19.7%	11.8%	13.7%
Total		Count	142	465	607
		% within GENDER	100.0%	100.0%	100.0%

4.2.1.4 Marital Status

The questionnaire also asked for current marital status; these data are presented in Table 4.5. Of the 627 respondents, 358 were married. There appears to be a marked gender difference in the percentage of married members: 117 males (79.6 percent) were married, while 241 females (50.2 percent) were married. Widowed members present a different picture: a much higher percentage of female respondents were widowed (32.5 percent) than male respondents (11.6 percent). The differences observed are statistically significant according to the chi-square test [X^2 (3) = 41.009, p = < .001].

Midwinter (1996: 35) wrote that U3A membership appears to be made up largely of single, divorced and widowed women. While in this sample those three groups also show a high percentage, the term “largely” does not quite apply, as 50.2 percent of the female participants are married.

Table 4.5: Marital status by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
MARITAL STATUS	MARRIED	Count	117	241	358
		% within GENDER	79.6%	50.2%	57.1%
	SINGLE	Count	3	33	36
		% within GENDER	2.0%	6.9%	5.7%
	WIDOWED	Count	17	156	173
		% within GENDER	11.6%	32.5%	27.6%
	DIVORCED	Count	10	50	60
		% within GENDER	6.8%	10.4%	9.6%
Total		Count	147	480	627
		% within GENDER	100.0%	100.0%	100.0%

4.2.1.5 Education Level

Table 4.6 presents the analysis of the next question about the highest level of education achieved. Respondents varied in their educational backgrounds. Of the participants, 29.7 percent indicated that completing high school was their highest level of education, and 23.4 percent had completed an undergraduate university degree. A total of 29.8 percent of respondents had completed business/technical or trade certificates or undergraduate diplomas.

Table 4.6: Education level

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	PRIMARY SCHOOL	14	2.2	2.2	2.2
	LESS THAN 2 YEARS HIGH SCHOOL	23	3.7	3.7	5.9
	HIGH SCHOOL	186	29.7	29.7	35.6
	BUSINESS, TECHNICAL OR TRADE CERTIFICATE	120	19.1	19.1	54.7
	UNDERGRADUATE DIPLOMA	67	10.7	10.7	65.4
	UNDERGRADUATE UNIVERSITY DEGREE	147	23.4	23.4	88.8
	POSTGRADUATE DEGREE	70	11.2	11.2	100.0
	Total	627	100.0	100.0	

Generally, the educational standard of the respondents appears to be quite high considering the schooling of many took place before, during and after World War II. Some researchers have suggested that the population of Elderhostels, Institutes of Learning in Retirement and U3As are “an elite group” because of their educational background (Culbertson, 1997, cited in Moody, 2004). Swindell (1991b: 7) also remarked on this: “Members of U3A tend to come from backgrounds which reflect high educational attainment.” The data of this research also show this (Table 4.8).

In Swindell’s research 3.7 percent of the participants had higher degrees (this study 11.2 percent), while 17.4 percent had undergraduate degrees (this study 23.4 percent), and 8.2 percent had an undergraduate diploma (this study 10.7 percent). As mentioned before, Swindell’s study (1991b: 7) was conducted more than a decade ago, and the increase in educational achievement appears to be understandable since each cohort is better prepared educationally than the previous one.

There is, however, a difference in the highest level of education achieved when it comes to gender. Table 4.7 illustrates that of the 480 women, a total of 20.8 percent completed an undergraduate university degree compared to 32 percent of the 120 males. The difference does not seem quite as marked with the postgraduate category, where 10 percent of females and 15 percent of males completed postgraduate degrees. Women appear much more likely to have high school as their highest level of education: 164 of the female participants, a total of 34.2 percent, compared to 22 of the men, or 15 percent. A chi-square test shows statistically significant differences between the educational attainments of male and female respondents [X^2 (6) = 25.082, p = < .001].

Table 4.7: Education level by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
EDUCATION LEVEL	PRIMARY SCHOOL	Count	4	10	14
		% within GENDER	2.7%	2.1%	2.2%
	LESS THAN 2 YEARS HIGH SCHOOL	Count	3	20	23
		% within GENDER	2.0%	4.2%	3.7%
	HIGH SCHOOL	Count	22	164	186
		% within GENDER	15.0%	34.2%	29.7%
	BUSINESS, TECHNICAL OR TRADE CERTIFICATI	Count	30	90	120
		% within GENDER	20.4%	18.8%	19.1%
	UNDERGRADUATE DIPLOMA	Count	19	48	67
		% within GENDER	12.9%	10.0%	10.7%
	UNDERGRADUATE UNIVERSITY DEGREE	Count	47	100	147
		% within GENDER	32.0%	20.8%	23.4%
	POSTGRADUATE DEGREE	Count	22	48	70
		% within GENDER	15.0%	10.0%	11.2%
Total		Count	147	480	627
		% within GENDER	100.0%	100.0%	100.0%

There is a substantial difference in the level of educational attainment of the above sample (Table 4.7) when compared with data of the Australian population, by gender, as shown in Table 4.8 (ABS, 2005).

Table 4.8: Comparison between ABS and U3A respondents' level of education

	ABS 55 to 70 Age Group		U3A Respondents	
Age Group 55 to 70	Male	Female	Male	Female
Postgraduate Degrees	3.64 percent	1.39 percent	15.0 percent	10.0 percent
Undergraduate Degrees	7.48 percent	6.43 percent	32.0 percent	20.8 percent

Swindel (1991b) expressed the view that while U3As appear to meet members' expectations, there remains the question of whether the U3A movement is seen as elitist,

and therefore not suitable for all older people. The above-average level of educational attainment of its members could be a barrier for some to become U3A members and participate.

4.2.1.6 Work before Retirement

Another demographic question was: "What type of work did you do before retirement?" The analysis is presented in Table 4.9. It is interesting to note that a total of 283 respondents, 45.3 percent, indicated that they were in "professional occupations"; the next highest is "secretarial/office work" with 157 (25.1 percent) of the members falling into that category. Fourteen percent (88) indicated that they had worked in management positions.

Table 4.9: Type of work before retirement

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	MANAGEMENT	88	14.0	14.1	14.1
	PROFESSIONAL	283	45.1	45.3	59.4
	SERVICE OCCUPATION	51	8.1	8.2	67.5
	TRADES PERSON	29	4.6	4.6	72.2
	SECRETARIAL/OFFICE WORK	157	25.0	25.1	97.3
	FARMING OR FORESTRY	3	.5	.5	97.8
	CONSTRUCTION AND MAINTENANCE	1	.2	.2	97.9
	UNSKILLED LABOR	13	2.1	2.1	100.0
	Total	625	99.7	100.0	
Missing	System	2	.3		
Total		627	100.0		

Employment was also analysed by gender and is displayed in Table 4.10. The results are interesting. In Table 4.9, for the total sample, it was those who worked in "professions" that rated highest; the same applies to these data. It is, however, the "management" section where differences can be observed between the genders. More males, 29.9 percent, have occupied management positions compared to only 9.2 percent of women. The greatest difference is, however, in "secretarial/office work" positions, with 31.4 percent of females having worked in that category compared to only 4.8 percent of males.

A chi-square test reveals that there were statistically significant differences in the work before retirement data between genders [X^2 (7) = 87.509, p = <.001] .

Table 4.10: Type of work before retirement by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
WORK	MANAGEMENT	Count	44	44	88
		% within GENDER	29.9%	9.2%	14.1%
	PROFESSIONAL	Count	67	216	283
		% within GENDER	45.6%	45.2%	45.3%
	SERVICE OCCUPATION	Count	13	38	51
		% within GENDER	8.8%	7.9%	8.2%
	TRADES PERSON	Count	13	16	29
		% within GENDER	8.8%	3.3%	4.6%
	SECRETARIAL/OFFICE WORK	Count	7	150	157
		% within GENDER	4.8%	31.4%	25.1%
	FARMING OR FORESTR	Count	3		3
		% within GENDER	2.0%		.5%
	CONSTRUCTION AND MAINTENANCE	Count		1	1
		% within GENDER		.2%	.2%
	UNSKILLED LABOR	Count		13	13
		% within GENDER		2.7%	2.1%
Total		Count	147	478	625
		% within GENDER	100.0%	100.0%	100.0%

4.2.1.7 Years of U3A Membership

Members were also asked to indicate when they became a U3A member, and 587 respondents answered this question. Table 4.11 shows the analysis of the number of years the respondents have been U3A members. On average, the respondents had been involved with the U3A for just over 5.5 years. The maximum number of years in the sample is 25 years, and the minimum 0 denotes members who joined during 2005.

Table 4.11: Years of U3A membership

Descriptive Statistics

	N	Minimum	Maximum	Mean	Standard Deviation
Years of having been a U3A member	**588**	**.00**	**25.00**	**5.6429**	**4.72281**
Valid N (listwise)	**588**				

(The table depicting the total group, showing the number of persons who joined each year, is shown in Appendix A1.)

The highest number of respondents joined U3A during the past 11 years. A few became U3A members before Box Hill and Frankston U3As were established, some of them stated that they had been members at other U3As in the Melbourne area, while two respondents indicated that they had been members in the UK. It appears that 122 have been members between 10 to 25 years (1980 to 2005).

The above section has shown the findings of the independent variables, the demographic data. In all categories the data have shown marked differences between genders. Women in this sample tend to be younger than men, and female U3A members outnumber males by a large margin of 76.7 to 23.4 percent. The other dependent variables, of educational attainment and of work before retirement, also show significant statistical differences between male and female participants.

4.2.2 U3A Specific Data

The background demographic information section has established the context for the presentation of the specific U3A findings. This study is an analysis of the role of the U3A in the provision of lifelong learning and, as stated earlier, one of the questions that this study is trying to answer is as follows:

1. Do male and female members of the U3A have significantly different perceptions as to the contribution of the U3A in the lives of older adults, and what are the barriers to participation?

The following section presents the findings that help to answer this question.

4.2.2.1 Participated in 2005

Table 4.12 illustrates the analysis of the question, "Have you participated in any U3A courses this year (2005)?" Of the 627 respondents, 590 participated this year and 37 did not. This presents a participation rate of 94.1 percent for the year 2005, which appears to be a high rate of participation.

Table 4.12: Participation in U3A courses in 2005

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	YES	590	94.1	94.1	94.1
	NO	37	5.9	5.9	100.0
	Total	627	100.0	100.0	

The participation results of the respondents by gender are shown in Table 4.13. Of the 590 respondents, 91.2 percent of men and 95 percent of women participated this year. Of those who did not participate this year, 8.8 percent were male and 5 percent female. Chi-square tests did not show statistically significant differences. There were too few of the respondents who did not participate this year (2005) to make accurate comparisons.

Table 4.13: Participation in U3A courses in 2005 by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
PARTICIPATED IN U3A THIS YEAR	YES	Count	134	456	590
		% within GENDER	91.2%	95.0%	94.1%
	NO	Count	13	24	37
		% within GENDER	8.8%	5.0%	5.9%
Total		Count	147	480	627
		% within GENDER	100.0%	100.0%	100.0%

4.2.2.2 Participation Benefits

Another question was, "How much do you feel that you have benefited from the courses that you enrolled in this year (2005)?" The analysis is shown in Table 4.14. It appears as if most participants felt that they had benefited. The category "very much" was chosen by 42.8 percent, and 36.3 percent of the respondents indicated that they experienced a "good deal" of benefits from participation. It is interesting to see that the majority, a total of 96.4 percent of the respondents, indicated the first three categories from a "fair amount" to "very much".

Table 4.14: Participation benefits in 2005

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	VERY MUCH	252	40.2	42.8	42.8
	A GOOD DEAL	214	34.1	36.3	79.1
	A FAIR AMOUN	105	16.7	17.8	96.9
	NOT MUCH	9	1.4	1.5	98.5
	LITTLE OR NON	7	1.1	1.2	99.7
	NOT SURE	2	.3	.3	100.0
	Total	589	93.9	100.0	
Missing	System	38	6.1		
Total		627	100.0		

These data have also been analysed by gender and are displayed in Table 4.15. As this analysis shows, females are much more likely to indicate “very much”, with 44.6 percent, whereas males, with 36.6 percent, tend to be a bit more negative. (A chi-square test for the overall benefit of participation by gender was slightly above the acceptable minimum count percentage (20 percent) for statistical significance, as indicated below.) The conclusion can be drawn that respondents, men and women, tend to rate the value of participation in U3A activities as generally high.

Table 4.15: Participation benefits in 2005 by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
OVERALL BENEFIT PARTICIPATION THIS YEAR	VERY MUCH	Count	49	203	252
		% within GENDER	36.6%	44.6%	42.8%
	A GOOD DEAL	Count	53	161	214
		% within GENDER	39.6%	35.4%	36.3%
	A FAIR AMOUNT	Count	25	80	105
		% within GENDER	18.7%	17.6%	17.8%
	NOT MUCH	Count	1	8	9
		% within GENDER	.7%	1.8%	1.5%
	LITTLE OR NONE	Count	4	3	7
		% within GENDER	3.0%	.7%	1.2%
	NOT SURE	Count	2		2
		% within GENDER	1.5%		.3%
Total		Count	134	455	589
		% within GENDER	100.0%	100.0%	100.0%

Chi-square test for Table 4.15

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	14.325[a]	5	.014
Likelihood Ratio	12.744	5	.026
Linear-by-Linear Association	5.193	1	.023
N of Valid Cases	589		

a. 4 cells (33.3%) have expected count less than 5. The minimum expected count is .46.

4.2.2.3 Preference for Classroom Settings

As indicated earlier, part of the research question was identifying the barriers to participation. The literature refers to one of the barriers as “institutional”, where inappropriate venues for classes have been mentioned by Cross (1981: 98) and Darkenwald and Merriam (1982: 137 cited in Findsen, 2001). The member questionnaire therefore included the following question: “In general, I would like courses to be conducted in [specify]”. The data are displayed in Table 4.16. There appears to be little difference in the preference of members for the type of classroom settings used in the two U3As. “Small informal groups” score slightly higher than the category “it does not matter”. The “traditional classroom” setting has a lower percentage than the “small informal groups”. A negligible 0.5 percent prefers private homes.

Table 4.16: Preference for classroom settings

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	TRADITIONAL CLASSROOM SETTINGS	172	27.4	27.7	27.7
	SMALL INFORMAL GROUPS	227	36.2	36.6	64.3
	IN PRIVATE HOMES	3	.5	.5	64.7
	IT DOES NOT MATTER	219	34.9	35.3	100.0
	Total	621	99.0	100.0	
Missing	System	6	1.0		
Total		627	100.0		

From a generation theory point of view, the group of adults in this study would belong to the ‘silent generation’ (Strauss and Howe, 1991, cited in Grabinski, 1998: 73–76). Grabinski states that this generation prefers formal or highly structured educational experiences. This does not seem to apply to this sample, where 71.9 percent express preference for classroom settings under the categories “it does not matter” and “small informal groups”.

While the responses in Table 4.16 were not statistically significant, there seems to be a “mild” difference in the preference of classroom settings as far as gender is concerned, as

Table 4.17 shows. It appears as if 31.0 percent of men prefer a “traditional classroom setting” compared to 26.7 percent of women. There seems to be a more even distribution as far as “small informal groups” are concerned, with 38.6 percent of males and 35.9 percent of females preferring that setting. The "private home” classroom setting does not appear to be liked at all. The “does not matter” category shows a marked difference between the genders, with 29.7 percent of men (43) and 37 percent of women (176). This was actually chosen by more women than any of the other categories. However, the differences observed between the two genders are not statistically significant according to the chi-square test.

Table 4.17: Preference for classroom settings by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
PREFERENCE FOR CLASSROOM LOCATION	TRADITIONAL CLASSROOM SETTINGS	Count	45	127	172
		% within GENDER	31.0%	26.7%	27.7%
	SMALL INFORMAL GROUPS	Count	56	171	227
		% within GENDER	38.6%	35.9%	36.6%
	IN PRIVATE HOMES	Count	1	2	3
		% within GENDER	.7%	.4%	.5%
	IT DOES NOT MATTER	Count	43	176	219
		% within GENDER	29.7%	37.0%	35.3%
Total		Count	145	476	621
		% within GENDER	100.0%	100.0%	100.0%

Chi-square test for Table 4.17

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	2.837 [a]	3	.417
Likelihood Ratio	2.870	3	.412
Linear-by-Linear Association	2.585	1	.108
N of Valid Cases	621		

a. 2 cells (25.0%) have expected count less than 5. The minimum expected count is .70.

The “it does not matter” and “small informal classroom” categories score the highest, as shown in both Tables 4.16 and 4.17. This could be seen as a positive sign for U3As,

seeing that so many of them have to conduct their classes in such a variety of venues, and not in formal educational settings. In Swindell's (1991) research the questions were slightly different, but the "it does not matter" category scored 67 percent.

The findings of the data for the two U3As are very similar. While this study was not meant to be a comparative study of the two U3As, there is however an accommodation aspect that needs to be mentioned. There is a significant difference in the scores of the two U3As, as shown in Table 4.18. The category "traditional classroom settings" scored 21.9 percent for Box Hill U3A, while the score of the Frankston U3A respondents was 37.1 percent. The difference also shows in the category "small informal settings" for classrooms, where the Box Hill score is 43 percent and Frankston shows 26.2 percent.
I believe that the reason for these differences can be found in the type of premises the two U3As occupy. Box Hill U3A is accommodated in a small old church building with only the nave of the church and one small room. It can be distracting for tutors and students to have two or three teaching sessions concurrently in the one large room. It is not surprising that 43 percent of the Box Hill respondents indicated their preference for "small informal groups". Frankston U3A is accommodated in formal classroom settings in a TAFE building, and that appears to be what the 37.1 percent of the Frankston U3A respondents prefer.

While the type of classroom setting may not be that significant for members generally, the availability of classrooms is. This can be seen in Tables 4.42 to 4.45 in the findings of the members survey and also in the presidents' survey (4.58 and 4.59), which will be discussed later. The question therefore remains if classroom settings and classroom availability present a barrier for participation in U3A activities.

Table 4.18: Preference for classroom settings: U3A Box Hill and Frankston

Crosstab

			U3A NAME		
			BOX HILL	FRANKSTON	Total
PREFERENCE FOR CLASSROOI LOCATION	TRADITIONAL CLASSROOM SETTINC	Count	84	88	172
		% within U3A NAM	21.9%	37.1%	27.7%
	SMALL INFORMAL GROUPS	Count	165	62	227
		% within U3A NAM	43.0%	26.2%	36.6%
	IN PRIVATE HOMES	Count	1	2	3
		% within U3A NAM	.3%	.8%	.5%
	IT DOES NOT MATTER	Count	134	85	219
		% within U3A NAM	34.9%	35.9%	35.3%
Total		Count	384	237	621
		% within U3A NAM	100.0%	100.0%	100.0%

4.2.2.4 Reasons Why Members Joined U3A

The data for the question "Why did you join the U3A?" are presented in Table 4.19. The question was given in two parts, with first preferences and second preferences (options). It appears as if the majority of participants joined U3A to "gain knowledge". This was the response of 70.2 percent, who indicated they joined for that reason. The second highest score, "for personal satisfaction", was indicated by 17.1 percent of respondents, and 8.6 percent joined U3A with their first priority to "mix with stimulating people".

Table 4.19: Reasons why members joined U3A (Option 1)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	CURIOSITY	12	1.9	1.9	1.9
	TO GAIN KNOWLEDGE	438	69.9	70.2	72.1
	PERSONAL SATISFACTION	107	17.1	17.1	89.3
	TO MIX WITH STIMULATING PEOPLE	54	8.6	8.7	97.9
	TO ESCAPE DAILY ROUTINE	5	.8	.8	98.7
	TO MAKE NEW FRIEND	8	1.3	1.3	100.0
	Total	624	99.5	100.0	
Missing	System	3	.5		
Total		627	100.0		

For “personal satisfaction” rated second in Option 1 (Table 4.19) and highest in Option 2 (Table 4.20) with 37.9 percent. The second highest for Option 2 was “mixing with stimulating people”, and the third highest “to make new friends”. Looking at both tables, “to gain knowledge”, “personal satisfaction” and “mixing with stimulating people” appear to be the main indicators of why people in this sample joined U3A.

Table 4.20: Reasons why members joined U3A (Option 2)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	CURIOSITY	22	3.5	3.8	3.8
	TO GAIN KNOWLEDGE	36	5.7	6.3	10.1
	PERSONAL SATISFACTION	217	34.6	37.9	48.0
	TO MIX WITH STIMULATING PEOPLE	186	29.7	32.5	80.5
	TO ESCAPE DAILY ROUTINE	29	4.6	5.1	85.5
	TO MAKE NEW FRIEND	83	13.2	14.5	100.0
	Total	573	91.4	100.0	
Missing	System	54	8.6		
Total		627	100.0		

The responses to “Why did you join U3A?” (Option 1) were also analysed by gender, and the results are displayed in Table 4.21. It appears that 72.1 percent of men and 69.9

percent of women joined U3A to “gain knowledge”. The second highest category is “for personal satisfaction”, answered by 13.6 percent of men and 18.2 percent of women. Otherwise the two groups are distributed in approximately the same manner, except that 4.8 percent of men joined “for curiosity” compared to only 1 percent of women. A few women indicated the categories “making friends” and “escaping daily routines”, while none of the males indicated this. The differences observed between genders are statistically significant according to the chi-square test [X^2 (5) = 13.741, p = < .017].

Table 4.21: Reasons why members joined U3A (Option 1) by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
WHY JOIN THE U3A? (OPTION 1)	CURIOSITY	Count	7	5	12
		% within GENDER	4.8%	1.0%	1.9%
	TO GAIN KNOWLEDGE	Count	106	332	438
		% within GENDER	72.1%	69.6%	70.2%
	PERSONAL SATISFACTION	Count	20	87	107
		% within GENDER	13.6%	18.2%	17.1%
	TO MIX WITH STIMULATING PEOPLE	Count	14	40	54
		% within GENDER	9.5%	8.4%	8.7%
	TO ESCAPE DAILY ROUTIN	Count		5	5
		% within GENDER		1.0%	.8%
	TO MAKE NEW FRIENDS	Count		8	8
		% within GENDER		1.7%	1.3%
Total		Count	147	477	624
		% within GENDER	100.0%	100.0%	100.0%

The question “Why did you join the U3A?” (Option 2) has also been analysed by gender, as shown in Table 4.22. The highest score appears to be “personal satisfaction”, and 42.1 percent of males and 36.6 percent of females indicated this. Second was “mixing with stimulating people”, indicated by 31.6 percent of men and 32.7 percent of women. In the category “to make new friends” women scored slightly higher than men: 12.0 percent for men and 15.2 percent for women. The findings are not statistically significant; the distribution of the data is fairly similar for men and women across these categories.

Table 4.22: Reasons why members joined U3A (Option 2) by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
WHY JOIN THE U3A? (OPTION 2)	CURIOSITY	Count	6	16	22
		% within GENDER	4.5%	3.6%	3.8%
	TO GAIN KNOWLEDGE	Count	8	28	36
		% within GENDER	6.0%	6.4%	6.3%
	PERSONAL SATISFACTION	Count	56	161	217
		% within GENDER	42.1%	36.6%	37.9%
	TO MIX WITH STIMULATING PEOPLE	Count	42	144	186
		% within GENDER	31.6%	32.7%	32.5%
	TO ESCAPE DAILY ROUTINE	Count	5	24	29
		% within GENDER	3.8%	5.5%	5.1%
	TO MAKE NEW FRIENDS	Count	16	67	83
		% within GENDER	12.0%	15.2%	14.5%
Total		Count	133	440	573
		% within GENDER	100.0%	100.0%	100.0%

4.2.2.5 Enrolment in TAFE or University Courses

Participants were also asked, "Have you enrolled during the past five years (including this year) in any of the TAFE or university courses?" The responses are documented in Table 4.23. It appears that only 8.1 percent (51) of the respondents had enrolled in courses offered by TAFE or a university during the past five years, while 91.9 percent (576) had not.

Table 4.23: Enrolment in TAFE or university courses

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	YES	51	8.1	8.1	8.1
	NO	576	91.9	91.9	100.0
	Total	627	100.0	100.0	

Respondents who answered NO to the question were asked to give a reason: "If you answered NO to question 12, what were the most important reasons for not enrolling in university or TAFE courses?" The responses to this question are displayed in Table 4.24,

which has also been broken down by gender. Of the 506 respondents to this question, 126 were male and 380 female. It appears that women are more concerned about the costs of courses (37.4 percent) than men (27 percent). Eighty-eight men (69.8 percent) and 142 women (37.4 percent) indicated that they were "not interested". The chi-square test for this data shows statistically significant differences $[X^2 (3) = 8.283, p = < .041]$.

Table 4.24: Reason for not enrolling in TAFE or university courses

Crosstab

			GENDER		
			MALE	FEMALE	Total
REASON FOR NOT ENROLLING IN TAFE/UNIV COURSE	TRANSPORT	Count	2	15	17
		% within GENDER	1.6%	3.9%	3.4%
	DISTANCE	Count	2	11	13
		% within GENDER	1.6%	2.9%	2.6%
	COST OF COURSES	Count	34	142	176
		% within GENDER	27.0%	37.4%	34.8%
	NOT INTERESTED	Count	88	212	300
		% within GENDER	69.8%	55.8%	59.3%
Total		Count	126	380	506
		% within GENDER	100.0%	100.0%	100.0%

It is understandable that the barrier for women would be cost. As has been mentioned earlier, quoting the work of Dale (2000: 791), only a small percentage of older adults can pay the fees to take up regular university studies. The cost barrier can be insurmountable, especially for those on a government pension. He also mentioned that post-retirement incomes were very low and that women were significantly worse off then men (Dale, 2000: 791, cited in Centre for Stress Management, 1996). The cost of courses is not a barrier when it comes to U3A courses. As mentioned earlier, the costs are negligible and respondents also indicated this in response to the open questions.

4.2.2.6 Improvement Due to U3A Participation

Question 14 of the questionnaire dealt with aspects in the life of members where it was felt that improvement might have occurred due to participation in U3A activities. It consisted of eight questions, and for each question a scale from "1" (not at all) to "5" (to a great extent) was used. The nine response categories were "social inclusion",

"intellectual development", "self-esteem", "independence", "ability to find employment", "memory", "health", "ability to keep up with technical changes", and "other". The analyses are presented separately in Tables 4.25 to 4.41.

4.2.2.6.a Social Inclusion

The analysis of the first category, that "participation increased feelings of social inclusion", is documented in Table 4.25. The majority of respondents of the total sample answered this in a positive way: 208 (37.9 percent) indicated "some extent". The next highest score was "more extent" with 32.4 percent. For the category "great extent" the response was 20 percent. The importance of "social inclusion" is shown in the results of "some extent", "more extent" and "great extent"; they have a total response rate of 90.3 percent.

Table 4.25: Participation increased feelings of social inclusion

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	NOT AT ALL	24	3.8	4.4	4.4
	LITTLE EXTENT	29	4.6	5.3	9.7
	SOME EXTENT	208	33.2	37.9	47.5
	MORE EXTENT	178	28.4	32.4	80.0
	GREAT EXTENT	110	17.5	20.0	100.0
	Total	549	87.6	100.0	
Missing	System	78	12.4		
Total		627	100.0		

The importance of social needs in later life has been documented earlier in this study, as indicated by Pinquart (2002a: 104), Siebert et al. (1999: 529) and others who maintain that "social relationships" are important in later life. As Antonucci and Akiyama (1991: 1) state, "social relationships are, in fact, fundamental to the experience of aging well", and Swindell (1999: 246) concluded in his review of the research that well-being and social networks have been consistently shown to be positively correlated. Abraham (1998: 535), for example, found that the Elderhostel participants in her sample were

predominantly motivated by the desire for social interaction with others who had common interests. The analysis of the "open question" section, which appears later in this study, indicates how important "social inclusion" or "socialising" is, especially for female respondents.

The data for "social inclusion" has also been analysed by gender, as shown in Table 4.26. It appears that "some extent" and "more extent" again present the highest scores. The highest indication for "more extent" by men is 38.9 percent, while 30.5 percent of women gave that indication. The highest percentage for women was for "some extent" with 38.5 percent, while 35.7 percent of men gave this answer. The "great extent" response was indicated by 21.7 percent of women and 14.3 percent of men. The differences observed are statistically significant according to the chi-square test [X^2 (4) = 11.141, p = < .025].

Table 4.26: Participation increased feelings of social inclusion by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
PARTICIPATION INCREASED FEELINGS OF SOCIAL INCLUSION	NOT AT ALL	Count	10	14	24
		% within GENDER	7.9%	3.3%	4.4%
	LITTLE EXTENT	Count	4	25	29
		% within GENDER	3.2%	5.9%	5.3%
	SOME EXTENT	Count	45	163	208
		% within GENDER	35.7%	38.5%	37.9%
	MORE EXTENT	Count	49	129	178
		% within GENDER	38.9%	30.5%	32.4%
	GREAT EXTENT	Count	18	92	110
		% within GENDER	14.3%	21.7%	20.0%
Total		Count	126	423	549
		% within GENDER	100.0%	100.0%	100.0%

4.2.2.6.b Intellectual Development

The response to the second question, that participation increased "intellectual development", is displayed in Table 4.27. A total of 96.2 percent indicated that participation had increased their intellectual development as the categories "some extent"

(38.5 percent), “more extent” (41.7 percent) and “great extent” (16 percent) show. This is a positive result as the main reason for joining U3A, as indicated in Table 4.19, was, for 70.2 percent of the respondents, “to gain knowledge”.

Table 4.27: Participation increased intellectual development

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	NOT AT ALL	6	1.0	1.1	1.1
	LITTLE EXTEN	15	2.4	2.7	3.7
	SOME EXTENT	217	34.6	38.5	42.2
	MORE EXTENT	235	37.5	41.7	83.9
	GREAT EXTEN	90	14.4	16.0	99.8
	Total	564	90.0	100.0	
Missing	System	63	10.0		
Total		627	100.0		

Table 4.28 shows the analysis by gender. The data are similar for men and women, and the chi-square test was not statistically significant. The percentage for “some extent” was 36.8 percent (49) for men and 39.0 percent (168) for women. The “more extent” and “great extent” categories show similar scores for both genders. The combined scores for “some extent”, “more extent” and “great extent” show 87.9 percent for men and 96.8 percent for women. This shows that “intellectual development” appears to be an important participation factor for both genders, and slightly more for women.

Table 4.28: Participation increased intellectual development by gender

			GENDER		
			MALE	FEMALE	Total
PARTICIPATION INCREASED INTELLECTUAL DEVELOPMENT	NOT AT ALL	Count	2	4	6
		% within GENDER	1.5%	.9%	1.1%
	LITTLE EXTENT	Count	6	10	16
		% within GENDER	4.5%	2.3%	2.8%
	SOME EXTENT	Count	49	168	217
		% within GENDER	36.8%	39.0%	38.5%
	MORE EXTENT	Count	54	181	235
		% within GENDER	40.6%	42.0%	41.7%
	GREAT EXTENT	Count	22	68	90
		% within GENDER	16.5%	15.8%	16.0%
Total		Count	133	431	564
		% within GENDER	100.0%	100.0%	100.0%

Chi square test for Table 4.28

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	3.074[a]	5	.689
Likelihood Ratio	3.024	5	.696
Linear-by-Linear Association	.503	1	.478
N of Valid Cases	564		

a. 5 cells (41.7%) have expected count less than 5. The minimum expected count is .24.

4.2.2.6.c Self-esteem

The responses to the third category, “self-esteem”, are presented in Table 4.29. It is interesting to see such a positive indication: 40.4 percent indicated “some extent”, while 84.6 percent indicated “some extent” or “great extent”.

Table 4.29: Participation increased self-esteem

PARTICIPATION INCREASED SELF ESTEEM

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	NOT AT ALL	35	5.6	7.1	7.1
	LITTLE EXTENT	38	6.1	7.8	14.9
	SOME EXTENT	198	31.6	40.4	55.3
	MORE EXTENT	133	21.2	27.1	82.4
	GREAT EXTENT	84	13.4	17.1	99.6
	33	2	.3	.4	100.0
	Total	490	78.1	100.0	
Missing	System	137	21.9		
Total		627	100.0		

The data were also analysed based on gender, as shown in Table 4.30. Women show a slightly higher percentage in the three combined responses of “some extent”, “more extent” and “great extent”: 318 women (85.5 percent) indicated an increase in self-esteem, while 82.2 percent of the 97 men also gave that indication. To “some extent” shows the highest percentage for both, with 37.3 percent (44) of men and 41.4 percent (154) of women indicating this category. The data are similar for both genders, and the chi-square test shows that these differences are not statistically insignificant. The results show that participation appears to have increased self-esteem for both genders of respondents.

Table 4.30: Participation increased self-esteem by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
PARTICIPATION INCREASED SELF ESTEEM	NOT AT ALL	Count	9	26	35
		% within GENDER	7.6%	7.0%	7.1%
	LITTLE EXTENT	Count	12	26	38
		% within GENDER	10.2%	7.0%	7.8%
	SOME EXTENT	Count	44	154	198
		% within GENDER	37.3%	41.4%	40.4%
	MORE EXTENT	Count	36	97	133
		% within GENDER	30.5%	26.1%	27.1%
	GREAT EXTENT	Count	17	67	84
		% within GENDER	14.4%	18.0%	17.1%
	33	Count		2	2
		% within GENDER		.5%	.4%
Total		Count	118	372	490
		% within GENDER	100.0%	100.0%	100.0%

Chi square test for Table 4.30

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	3.556[a]	5	.615
Likelihood Ratio	3.969	5	.554
Linear-by-Linear Association	1.032	1	.310
N of Valid Cases	490		

a. 2 cells (16.7%) have expected count less than 5. The minimum expected count is .48.

The importance of regaining or increasing self-esteem has also been mentioned by the respondents, and is documented under the “open question” remarks later in this study. Pinquart (2002a: 104) 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 (1993, cited in Hall-Elston and Mullins, 1999: 505) also found that peer friendships in later life were critical to positive self-image, confidence, and self-esteem.

4.2.2.6.d Independence

The next category, “independence”, is analysed in Table 4.31. The response category “some extent” was indicated by 28.3 percent; the second highest score was for “more extent”, with 22.7 percent. A total of 12.7 percent indicated “great extent”, and “not at all” had a response rate of 20.7 percent.

Table 4.31: Participation increased feelings of independence

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	NOT AT ALL	85	13.6	20.7	20.7
	LITTLE EXTENT	64	10.2	15.6	36.3
	SOME EXTENT	116	18.5	28.3	64.6
	MORE EXTENT	93	14.8	22.7	87.3
	GREAT EXTENT	52	8.3	12.7	100.0
	Total	410	65.4	100.0	
Missing	System	217	34.6		
Total		627	100.0		

The data were also analysed by gender, as presented in Table 4.32. This shows some interesting results, and males appear to be more negative in their evaluation. The response “little extent” was given by 26.7 percent of males (27), and 12 percent of females (37). Both males and females indicated “some extent” as the highest score, with 27.7 percent of males (28) and 28.5 percent of women (88), while 23.9 percent of females and 18.8 percent of males indicated “more extent”. The response “great extent” was indicated by only 5.0 percent of males, while 15.2 percent of females gave this response. The chi-square tests show statistically significant differences [X^2 (4) = 17.911, p = < .001].

The combined results of the categories “some extent”, “more extent” and “great extent” also show quite a difference for the two genders: 51.5 percent for men and 67.6 percent for women. Women feel more strongly that participation in U3A activities has increased their independence.

Table 4.32: Participation increased feelings of independence by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
PARTICIPATION INCREASED INDEPENDENCE	NOT AT ALL	Count	22	63	85
		% within GENDER	21.8%	20.4%	20.7%
	LITTLE EXTENT	Count	27	37	64
		% within GENDER	26.7%	12.0%	15.6%
	SOME EXTENT	Count	28	88	116
		% within GENDER	27.7%	28.5%	28.3%
	MORE EXTENT	Count	19	74	93
		% within GENDER	18.8%	23.9%	22.7%
	GREAT EXTENT	Count	5	47	52
		% within GENDER	5.0%	15.2%	12.7%
Total		Count	101	309	410
		% within GENDER	100.0%	100.0%	100.0%

As shown earlier, much has been made in the literature of the concept of independence. In the 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 et al., 1995: 107). Some studies have also shown that involvement in later life education contributes to a sense of control because of its relationship to a sense of confidence in the ability to learn (Price and Lyon, 1982, cited in Kolland, 1993: 535).

4.2.2.6.e Employment

The next section of question 14 was "Participation increased ability to find employment." Only 11 males and 43 females out of the total sample answered this question. Of the 54 respondents, 74.1 percent indicated "not at all", and 14.8 percent indicated "little extent". The response for the categories "some extent" to "great extent" was 11.2 percent. U3A has not aimed to educate or train people to find employment after retirement, and this is shown in the low interest in answering this question. The results are shown in Table 4.33.

Table 4.33: Participation increased ability to find employment by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
PARTICIPATION INCREASED ABILITY TO FIND EMPLOYMENT	NOT AT ALL	Count	7	33	40
		% within GENDER	63.6%	76.7%	74.1%
	LITTLE EXTENT	Count	4	4	8
		% within GENDER	36.4%	9.3%	14.8%
	SOME EXTENT	Count		3	3
		% within GENDER		7.0%	5.6%
	MORE EXTENT	Count		1	1
		% within GENDER		2.3%	1.9%
	GREAT EXTENT	Count		2	2
		% within GENDER		4.7%	3.7%
Total		Count	11	43	54
		% within GENDER	100.0%	100.0%	100.0%

4.2.2.6.f Memory

The question of whether participation enhanced memory was analysed as indicated in Table 4.34 for the total sample and in Table 4.35 by gender. The majority of respondents felt that participation did enhance memory. The categories “some extent” to “great extent” were indicated by 87.9 percent of the respondents. To “some extent” was indicated by 40.5 percent and “more extent” by 38.5 percent.

Table 4.34: Participation enhanced memory

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	NOT AT ALL	34	5.4	6.2	6.2
	LITTLE EXTENT	32	5.1	5.8	12.0
	SOME EXTENT	223	35.6	40.5	52.5
	MORE EXTENT	212	33.8	38.5	91.1
	GREAT EXTENT	49	7.8	8.9	100.0
	Total	550	87.7	100.0	
Missing	System	77	12.3		
Total		627	100.0		

Analysis of this question based on gender is shown in Table 4.35. The “some extent” response was similar for both genders, with 41.9 percent (52) of males and 40.1 percent (171) of women. The “more extent” response differed: 32.3 percent (40) of males and 40.4 percent (172) of females. It appears that males are more likely to indicate “not at all” (8.9 percent) or “little extent” (9.7 percent) than females, where 5.4 percent indicated “not at all” and 4.7 percent “little extent”. The chi-square test for the gender analysis was not statistically significant. The t-test, which is significant, is shown below Table 4.35. It is interesting to see that for both groups “participation increased memory” has been rated positively: the categories “some extent” to “great extent” scored 81.5 percent for men and 89.9 percent for women.

Table 4.35: Participation enhanced memory by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
PARTICIPATION INCREASED MEMORY	NOT AT ALL	Count	11	23	34
		% within GENDER	8.9%	5.4%	6.2%
	LITTLE EXTENT	Count	12	20	32
		% within GENDER	9.7%	4.7%	5.8%
	SOME EXTENT	Count	52	171	223
		% within GENDER	41.9%	40.1%	40.5%
	MORE EXTENT	Count	40	172	212
		% within GENDER	32.3%	40.4%	38.5%
	GREAT EXTENT	Count	9	40	49
		% within GENDER	7.3%	9.4%	8.9%
Total		Count	124	426	550
		% within GENDER	100.0%	100.0%	100.0%

T-test for Table 4.35

Independent Samples Test

		Levene's Test for Equality of Variances		t-test for Equality of Means		
		F	Sig.	Sig. (2-tailed)	Mean Difference	Std. Error Difference
PARTICIPATION INCREASED MEMORY	Equal variances assumed	.346	.556	.012	-.24	.097
	Equal variances not assumed			.018	-.24	.102

4.2.2.6.g Health

The analysis of the question that “participation increased health” is shown for the group in Table 4.36. The categories “some extent” (39.8 percent) and “more extent” (21.9 percent) showed the highest scores.

Table 4.36: Participation increased health

PARTICIPATION INCREASED HEALTH

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	NOT AT ALL	72	11.5	14.1	14.1
	LITTLE EXTENT	68	10.8	13.3	27.3
	SOME EXTENT	204	32.5	39.8	67.2
	MORE EXTENT	112	17.9	21.9	89.1
	GREAT EXTENT	56	8.9	10.9	100.0
	Total	512	81.7	100.0	
Missing	System	115	18.3		
Total		627	100.0		

Analysis for this question based on gender is shown in Table 4.37. It appears that males are more likely to indicate “little extent” whereas females are more likely to indicate “some extent”. The highest percentage score for both groups is in the “some extent” category, where 30.3 percent (36) of males and 42.7 percent (168) of women indicated that participation did contribute to increased health. The category “more extent” is similar for males 20.2 percent (24) and females 22.4 percent (88). To a “great extent” is indicated by 9.2 percent (11) of men and 11.5 percent (445) of women. There is a marked difference in the response “little extent”, with males 22.7 percent (21), females 10.4 percent, and also in the “not at all” group, with males 17.6 percent and females 13.0 percent. The combined results for the categories “some extent”, “more extent” and “great extent” for both genders show 59.7 percent for men and 76.6 percent for women. This again shows a substantial difference between the gender groupings. Chi-square tests show statistically significant differences [X^2 (4) = 15.941, p = < .003].

Table 4.37: Participation increased health by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
PARTICIPATION INCREASED HEALTH	NOT AT ALL	Count	21	51	72
		% within GENDER	17.6%	13.0%	14.1%
	LITTLE EXTENT	Count	27	41	68
		% within GENDER	22.7%	10.4%	13.3%
	SOME EXTENT	Count	36	168	204
		% within GENDER	30.3%	42.7%	39.8%
	MORE EXTENT	Count	24	88	112
		% within GENDER	20.2%	22.4%	21.9%
	GREAT EXTENT	Count	11	45	56
		% within GENDER	9.2%	11.5%	10.9%
Total		Count	119	393	512
		% within GENDER	100.0%	100.0%	100.0%

There have been a number of research studies and articles, as discussed earlier, indicating that learning and well-being are positively correlated (Pinquart, 2002a: 104). MacNeil and Teague (1987: 115) also found that people who maintain their intellectual interest as they grow older tend to maintain and increase various dimensions of cognitive functioning.

The question of whether participation improved health was also analysed from the perspective of age, and this analysis is presented in Table 4.38. The category to “some extent” had a high response from all with the 70–79 and the 80+ group, scoring 46.2 percent. In the “not at all” category the highest scores were in the 60–69 (14.5 percent) and 70–79 (15.6 percent) age groups. “Little extent” was indicated mainly by the <60 category (23.5 percent) and the 60–69 (17.3 percent) group. For the “some extent” category the <60 group scored 35.3 percent and the 60–69 group 29.5 percent. It appears that those in the 80+ age category are more likely to indicate “great extent”. It is interesting to note that the response of the combined positive indications of “some”, “more” and “great extent” have a high combined total in all age categories, with the <60 age group scoring 64.7 percent, the 60–69 category 68.6 percent, the 70–79 category 74.2 percent, and the 80+ category scoring 81.6 percent. It appears as if the older age

categories show the most positive response to this question. The chi-square test shows statistically significant differences [X^2 (12) = 27.502, p = < .007].

Table 4.38: Participation increased health: age category

Crosstab

			Age category				
			<60	60-69	70-79	80+	Total
PARTICIPATI INCREASED HEALTH	NOT AT ALL	Count	4	25	35	6	70
		% within Age cate	11.8%	14.5%	15.6%	9.2%	14.1%
	LITTLE EXTE	Count	8	30	23	6	67
		% within Age cate	23.5%	17.3%	10.2%	9.2%	13.5%
	SOME EXTEI	Count	12	51	104	30	197
		% within Age cate	35.3%	29.5%	46.2%	46.2%	39.6%
	MORE EXTEI	Count	5	50	42	11	108
		% within Age cate	14.7%	28.9%	18.7%	16.9%	21.7%
	GREAT EXTE	Count	5	17	21	12	55
		% within Age cate	14.7%	9.8%	9.3%	18.5%	11.1%
Total		Count	34	173	225	65	497
		% within Age cate	100.0%	100.0%	100.0%	100.0%	100.0%

4.2.2.6.h Keeping Up With Technical Change

The last item of question 14 was “Has participation increased ability to keep up with technical change?” The group analysis is shown in Table 4.39. Of the 459 respondents who answered this question, 143 (31.2 percent) indicated “not at all”, and 125 (27.5 percent) “some extent”.

Table 4.39: Participation increased ability to keep up with technical change

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	NOT AT ALL	143	22.8	31.2	31.2
	LITTLE EXTENT	76	12.1	16.6	47.7
	SOME EXTENT	126	20.1	27.5	75.2
	MORE EXTENT	84	13.4	18.3	93.5
	GREAT EXTENT	30	4.8	6.5	100.0
	Total	459	73.2	100.0	
Missing	System	168	26.8		
Total		627	100.0		

This question was also analysed by gender, but does not show statistically significant relationships. The analysis is displayed in Table 4.40, with the chi-square table following.

Table 4.40: **Participation increased ability to keep up with technical change by gender**

Crosstab

			GENDER		
			MALE	FEMALE	Total
PARTICIPATION INCREASED ABILITY TO KEEP UP WITH TECH CHANGE	NOT AT ALL	Count	34	109	143
		% within GENDER	30.1%	31.5%	31.2%
	LITTLE EXTENT	Count	23	53	76
		% within GENDER	20.4%	15.3%	16.6%
	SOME EXTENT	Count	33	93	126
		% within GENDER	29.2%	26.9%	27.5%
	MORE EXTENT	Count	17	67	84
		% within GENDER	15.0%	19.4%	18.3%
	GREAT EXTENT	Count	6	24	30
		% within GENDER	5.3%	6.9%	6.5%
Total		Count	113	346	459
		% within GENDER	100.0%	100.0%	100.0%

Chi-square test for Table 4.40

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	2.741[a]	4	.602
Likelihood Ratio	2.734	4	.603
Linear-by-Linear Association	.499	1	.480
N of Valid Cases	459		

a. 0 cells (.0%) have expected count less than 5. The minimum expected count is 7.39.

It is interesting, however, that there is a marked difference in the age category analysis of the same question, as documented in Table 4.41. The lower age groups, <60 (48.3 percent), and 60–69 (40.9 percent), indicate "not at all", while "some extent" scores higher in the 70–79 (30.3 percent) and 80+ (47.2 percent) categories. The category "more extent" is rated highest in the 70–79 group of respondents with 22.9 percent. It appears as if the older categories show higher scores in "some extent", "more extent" and "great extent". Those in the 80+ category seem more likely to feel that the U3A is increasing their ability to keep up with technical change to "some extent". The differences observed are statistically significant according to the chi-square test [X^2 (12) = 37.256, p = < .007].

Table 4.41: Participation increased ability to keep up with technical change: age category

Crosstab

			Age category				
			<60	60-69	70-79	80+	Total
PARTICIPATION INCREASED ABII TO KEEP UP WIT TECH CHANGE	NOT AT ALL	Count	14	64	51	7	136
		% within Age cate	48.3%	40.3%	25.4%	13.2%	30.8%
	LITTLE EXTE	Count	8	28	30	9	75
		% within Age cate	27.6%	17.6%	14.9%	17.0%	17.0%
	SOME EXTEI	Count	3	31	61	25	120
		% within Age cate	10.3%	19.5%	30.3%	47.2%	27.1%
	MORE EXTEI	Count	2	26	46	8	82
		% within Age cate	6.9%	16.4%	22.9%	15.1%	18.6%
	GREAT EXTE	Count	2	10	13	4	29
		% within Age cate	6.9%	6.3%	6.5%	7.5%	6.6%
Total		Count	29	159	201	53	442
		% within Age cate	100.0%	100.0%	100.0%	100.0%	100.0%

The above data for question 14 of the members' questionnaire appears to show that members felt improvement had occurred due to their participation in U3A activities. In the categories of "social inclusion", "intellectual development", "increased memory" and "self-esteem", the rate of improvement in the combined categories of "some extent" to "great extent" showed response rates around 90 percent. Other categories also showed a high response. The results for males and females showed significant statistical differences in the categories of "social inclusion", "independence", and "increased memory".

4.2.2.7 Areas for Improvement of U3A

While designing the surveys I felt it was also necessary to give U3A members the opportunity to show if, in their opinion, there was room for improvement in U3A. One of the questions therefore asked respondents to indicate any "Areas where U3A could be improved". The question was ranked 1, 2 and 3. The results of the group analysis of Rank 1 are shown in Table 4.42. A total of 374 respondents completed this question, with 253 not responding. The highest score is in the category "types of courses offered" with 38.8 percent, and "classroom availability" with 29.7 percent.

Table 4.42: Areas where U3A could be improved (Rank 1)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	TYPES OF COURSE OFFERED	145	23.1	38.8	38.8
	QUALITY OF TUTORS	61	9.7	16.3	55.1
	CLASSROOM AVAILABILITY	111	17.7	29.7	84.8
	TIMES AND SCHEDULING OF COURSES	54	8.6	14.4	99.2
	OTHER	3	.5	.8	100.0
	Total	374	59.6	100.0	
Missing	System	253	40.4		
Total		627	100.0		

Table 4.43 (Rank 2), also shows the highest scores in the same categories, "types of courses offered" (26.8 percent) and "classroom availability" (26.8 percent). This seems to

indicate that types of courses offered and classroom availability are the main areas where members feel that improvement should occur.

Table 4.43: **Areas where U3A could be improved (Rank 2)**

AREAS WHERE U3A COULD BE IMPROVED (RANK 2)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	TYPES OF COURSE OFFERED	64	10.2	26.8	26.8
	QUALITY OF TUTORS	45	7.2	18.8	45.6
	CLASSROOM AVAILABILITY	64	10.2	26.8	72.4
	TIMES AND SCHEDULING OF COURSES	62	9.9	25.9	98.3
	OTHER	4	.6	1.7	100.0
	Total	239	38.1	100.0	
Missing	System	388	61.9		
Total		627	100.0		

The score in the category “type of courses offered” is very high at 38.8 percent. Later in this study, in one of the open-ended questions, a table enumerating the courses that respondents would like to see offered shows interesting results (Table 4.56). The reason for the problem area “type of courses offered” may be a lack of availability of tutors in certain subject areas. This is understandable in the self-help philosophy of U3A. The presidents’ survey findings presented later in this study will show some additional information in regard to this question.

Earlier in the findings the importance of “classroom settings” was analysed. The analysis in Tables 4.16 and 4.17 showed that the majority preferred “small informal group” settings and over 35 percent indicated “it does not matter”. While the type of classroom setting may not be that important for members, the availability of classrooms certainly is, as shown in the analysis of Tables 4.42 and 4.43, where classroom availability scored in Option 1 and in Option 2 as the second highest with around 30 percent.

The findings of the presidents' surveys of U3As in Victoria show similar results. The accommodation problem is also the main issue in the study by Hurworth and Rutter (2000: 40), who found that U3As in Victoria operated from about 400 venues, of which 38 percent were private homes. The question therefore remains if classroom availability presents a general barrier to participation.

The question "Areas where U3A could be improved" (Rank 1) has also been analysed by gender, as shown in Table 4.44. Here the category "type of courses offered" shows the highest scores, indicated by 42.4 percent of males and 37.6 percent of women. The other category of interest is again "classroom availability", indicated by 22.8 percent of males and 31.9 percent of females. All other categories are similar for males and females. Chi-square tests show no statistically significant differences.

Table 4.44: Areas where U3A could be improved (Rank 1) by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
AREAS WHEF U3A COULD E IMPROVED (RANK 1)	TYPES OF COURSE OFFERED	Count	39	106	145
		% within GENDI	42.4%	37.6%	38.8%
	QUALITY OF TUTORS	Count	16	45	61
		% within GENDI	17.4%	16.0%	16.3%
	CLASSROOM AVAILAB	Count	21	90	111
		% within GENDI	22.8%	31.9%	29.7%
	TIMES AND SCHEDULI OF COURSES	Count	14	40	54
		% within GENDI	15.2%	14.2%	14.4%
	OTHER	Count	2	1	3
		% within GENDI	2.2%	.4%	.8%
Total		Count	92	282	374
		% within GENDI	100.0%	100.0%	100.0%

Chi-square test for Table 4.44

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	5.345[a]	4	.254
Likelihood Ratio	4.943	4	.293
Linear-by-Linear Association	.218	1	.640
N of Valid Cases	374		

a. 2 cells (20.0%) have expected count less than 5. The minimum expected count is .74.

The analysis of Rank 2, by gender, shows the same categories, with high ratings for category 1, and similar scores for males and females. The results are shown in Table 4.45.

Table 4.45: Areas where U3A could be improved (Rank 2) by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
AREAS WHERE U3A COULD BE IMPROVED (RANK 2)	TYPES OF COURSE OFFERED	Count	16	48	64
		% within GENDER	27.1%	26.7%	26.8%
	QUALITY OF TUTORS	Count	14	31	45
		% within GENDER	23.7%	17.2%	18.8%
	CLASSROOM AVAILABILITY	Count	16	48	64
		% within GENDER	27.1%	26.7%	26.8%
	TIMES AND SCHEDULING OF COURSES	Count	13	49	62
		% within GENDER	22.0%	27.2%	25.9%
	OTHER	Count		4	4
		% within GENDER		2.2%	1.7%
Total		Count	59	180	239
		% within GENDER	100.0%	100.0%	100.0%

4.2.2.8 Reasons for Not Joining U3A Earlier

The response to the question “What kept you from participating (joining U3A) at an earlier date?” has been documented in Table 4.46. The category “I was not aware of the existence of the U3A” had the largest number of respondents, with 250 (31.8 percent) answering. The second highest rating was the category “I thought I was too old to learn”, indicated by 102 (13 percent). The category “the lecture/learning environment was not suitable” had a percentage rating of 9.3 percent, and 8.6 percent indicated that “negative experiences in previous educational circumstances” kept them from participating at an earlier stage. A large group of 29.6 percent (233) of the respondents indicated “other”. Of the 233 who answered this “open” question, 160 remarked that they had still been working full- or part-time and were therefore unable to join earlier. Twenty-one respondents stated that they “were too young”, they had inadequate information, and thought that they had to be 65 years to join. Twenty-seven stated that they were the “carer” and looked after or nursed an ill spouse.

Table 4.46: **Reasons for not joining U3A earlier**

Code / Count / Response

Not aware of existence of U3A	1	250	31.8 percent
Thought I was too old to learn	2	102	13.0 percent
Negative experiences from previous educational circumstances	3	68	8.6 percent
Term "university" put me off	4	61	7.8 percent
Lecture venue/environment not convenient	5	73	9.3 percent
Other	6	233	29.6 percent
Total Responses		787	100.00 percent
66 missing cases / 561 valid cases			

Reasons for not participating in U3A earlier have also been analysed according to gender, as displayed in Table 4.47. The category "I was not aware of U3A", was selected by 34.9 percent of men and 30.8 percent of women. For "the term 'university' put me off", women rated 8.7 percent and men 4.8 percent. The category "negative experiences in previous educational circumstances" shows a marked difference between the two groups: 14.3 percent of men and only 6.9 percent of women indicated it. For the question "I thought I was too old to learn", the responses for both genders are similar, with 11.1 percent of males and 13.5 percent of females. The fifth category, "learning environment not convenient", was also similarly rated by both groups.

Table 4.47: Reasons for not joining U3A earlier by gender

CATEGORY	MALE	%	FEMALE	%	TOTAL	%
I was not aware of U3A	66	34.9	184	30.8	250	31.8
I thought I was too old	21	11.1	81	13.5	102	13.0
Negative previous educational experiences	27	14.3	41	6.9	68	8.6
The term university put me off	9	4.8	52	8.7	61	7.8
Lecture/Learning environment inconvenient	17	9.0	56	9.4	73	9.3
Other	49	25.9	184	30.8	233	29.6
Total	189	100	598	100	787	100

(Percentages and totals based on respondents: 561 valid cases; 66 missing cases)

The results presented in Table 4.46 and 4.47 are interesting. Of the 787 respondents, a total of 250 (31.8 percent) were not aware of the existence of U3As, which seems very

high. Advertising, which both U3As maintain they do, appears not to have been totally effective. The literature review chapter shows that there is a general lack of awareness of learning opportunities provided for people past working age. Hiemstra (1994) and Peterson and Masunaga (1998) maintain that lack of awareness is one of the main obstacles preventing people from continuing with lifelong learning. Governments do not generally provide information or encourage lifelong learning after retirement from the workforce. McDonell (1998a:9) refers to this as "foolishly short-sighted'.

Table 4.47 shows that 14.3 percent of men and only 6.9 percent of female respondents indicated that "negative experiences in previous educational circumstances" had kept them from joining U3A earlier. This seems like a high percentage for male respondents compared to females. Negative experiences in early schooling may, however, linger for a lifetime. This has been indicated by Jones (2000: 343), or as Stuart-Hamilton (1998: 67) states, "we are what we are because of what we were", referring to negative experiences in childhood and the fact that they play an important part in attitudes towards participation in education in later life. McGivney (2004: 55) also maintains that "what happens at school has a significant and sometimes lasting impact on subsequent attitudes towards education".

Thirteen percent of the respondents indicated that they did not join U3A earlier as they thought they were "too old to learn". Stereotypical images of the elderly still widely persist in our society, as discussed earlier, and present barriers for later life learning. Lamdin and Fugate (1997: 37) write that this has a negative impact on the self-image of older people and prevents them from looking for learning experiences.

4.2.2.9 Service as Tutor

As stated earlier, the U3A is a self-help organisation as far as teaching and administration are concerned. The motto of "those who teach shall also learn and those who learn shall also teach" (Laslett, 1996: 228) is the basis of the peer teaching philosophy of U3As. One of the survey questions was: "Have you ever served as a tutor?" The data for this question

are documented in Table 4.48, which shows that 94 (15.1 percent) indicated that they had served as tutors.

Table 4.48: Service as tutor at a U3A

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	YES	94	15.0	15.1	15.1
	NO	530	84.5	84.9	100.0
	Total	624	99.5	100.0	
Missing	System	3	.5		
Total		627	100.0		

The results of this question were also analysed by gender, as shown in Table 4.49. Thirty of the males, 20.5 percent, and 64 of the females, 13.3 percent, had served as tutors. The differences observed are statistically significant according to the chi-square test [X^2 (1) = 4.480, p = < .034].

Table 4.49: Service as a tutor at a U3A by gender

Crosstab

			GENDER		
			MALE	FEMALE	Total
EVER SERVED AS A TUTOR AT A U3A?	YES	Count	30	64	94
		% within GENDER	20.5%	13.4%	15.1%
	NO	Count	116	414	530
		% within GENDER	79.5%	86.6%	84.9%
Total		Count	146	478	624
		% within GENDER	100.0%	100.0%	100.0%

It seemed interesting to see if there was a difference as far as educational background was concerned for those who had served as tutors. Table 4.50 shows that analysis. It appears that those who have served as tutors are more likely to have an undergraduate or postgraduate degree than those who have not. Of the 94 who served as tutors, 37.2 percent (35) had an undergraduate degree and 17.0 percent (16) had a postgraduate degree. The third highest group were respondents with business, technical or trade certificates, with 16 percent. The chi-square test shows statistically significant differences [X^2 (6) = 29.367, p = < .001].

Table 4.49 shows that a higher percentage of men (20.5 percent) had served as tutors compared to 13.4 percent of the women. Table 4.7 (p. 107) shows that more men than women completed undergraduate and postgraduate degrees. This may explain the gender differences in those that served as tutors.

Table 4.50: Education level: Ever served as a tutor at a U3A?

Crosstab

			EVER SERVED AS A TUTOR AT A U3A?		
			YES	NO	Total
EDUCATION LEVEL	PRIMARY SCHOOL	Count		13	13
		% within EVER SERVED AS A TUTOR AT A U3A?		2.5%	2.1%
	LESS THAN 2 YEARS HIGH SCHOOL	Count	7	16	23
		% within EVER SERVED AS A TUTOR AT A U3A?	7.4%	3.0%	3.7%
	HIGH SCHOOL	Count	13	172	185
		% within EVER SERVED AS A TUTOR AT A U3A?	13.8%	32.5%	29.6%
	BUSINESS, TECHNICAL OR TRADE CERTIFICATE	Count	15	105	120
		% within EVER SERVED AS A TUTOR AT A U3A?	16.0%	19.8%	19.2%
	UNDERGRADUATE DIPLOMA	Count	8	59	67
		% within EVER SERVED AS A TUTOR AT A U3A?	8.5%	11.1%	10.7%
	UNDERGRADUATE UNIVERSITY DEGREE	Count	35	112	147
		% within EVER SERVED AS A TUTOR AT A U3A?	37.2%	21.1%	23.6%
	POSTGRADUATE DEGREE	Count	16	53	69
		% within EVER SERVED AS A TUTOR AT A U3A?	17.0%	10.0%	11.1%
Total		Count	94	530	624
		% within EVER SERVED AS A TUTOR AT A U3A?	100.0%	100.0%	100.0%

4.2.2.10 Service on Management Committee

The self-help philosophy of the U3A also includes members performing all administrative tasks. One of the survey questions was, “Have you ever served on the management committee of a U3A?” The response of the sample is displayed in Table 4.51. Fifty-one members, 8.2 percent of the respondents, answered “yes” to this question. The results to this question were also analysed by gender. There was no difference between genders, as both groups scored 8.2 percent.

Table 4.51: Service on a U3A management committee

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	YES	51	8.1	8.2	8.2
	NO	573	91.4	91.8	100.0
	Total	624	99.5	100.0	
Missing	System	3	.5		
Total		627	100.0		

The analysis of those who served on a management committee from an educational background point of view is displayed in Table 4.52. The largest proportion of those who had served on the management committee appears to be those with an undergraduate degree (39.2 percent). This is followed by the business, technical or trade certificate category with 21.6 percent, and the completed high school category with 19.6 percent. It is interesting to note that of the group with a postgraduate degree, only 5.9 percent served on a management committee, while 11.5 percent did not.

Table 4.52: Education level: Service on a management committee of a U3A

Crosstab

			EVER SERVED ON MANAGEMENT COMMITEE OF A U3A		
			YES	NO	Total
EDUCATION LEVEL	PRIMARY SCHOOL	Count	3	10	13
		% within EVER SERVED ON MANAGEMENT COMMITEE OF A U3A?	5.9%	1.7%	2.1%
	LESS THAN 2 YEARS HIGH SCHOOL	Count	4	19	23
		% within EVER SERVED ON MANAGEMENT COMMITEE OF A U3A?	7.8%	3.3%	3.7%
	HIGH SCHOOL	Count	10	175	185
		% within EVER SERVED ON MANAGEMENT COMMITEE OF A U3A?	19.6%	30.5%	29.6%
	BUSINESS, TECHNICAL OR TRADE CERTIFICATE	Count	11	109	120
		% within EVER SERVED ON MANAGEMENT COMMITEE OF A U3A?	21.6%	19.0%	19.2%
	UNDERGRADUATE DIPLOMA	Count		67	67
		% within EVER SERVED ON MANAGEMENT COMMITEE OF A U3A?		11.7%	10.7%
	UNDERGRADUATE UNIVERSITY DEGREE	Count	20	127	147
		% within EVER SERVED ON MANAGEMENT COMMITEE OF A U3A?	39.2%	22.2%	23.6%
	POSTGRADUATE DEGREE	Count	3	66	69
		% within EVER SERVED ON MANAGEMENT COMMITEE OF A U3A?	5.9%	11.5%	11.1%
Total		Count	51	573	624
		% within EVER SERVED ON MANAGEMENT COMMITEE OF A U3A?	100.0%	100.0%	100.0%

The member questionnaire also contained some open-ended questions. These will be discussed in the following section.

4.2.3 Responses to Open-ended Questions

The U3A member questionnaire contained several open-ended questions to give further explanation and illumination to the following research questions.

- What do current and past U3A members feel are the most important contributions of participation in the U3A to the lives of older adults, and what are the most significant barriers to participation?

- Do male and female members of the U3A have significantly different perceptions as to the contributions of the U3A to the lives of older adults and the barriers to participation?

4.2.3.1 Other Benefits Experienced as a Result of Participation

One of the questions, number 14 in the member questionnaire, asked the respondents for open-ended responses to: "Have you experienced any other benefits as a result of participation in the U3A that are not included on this list?" The original list consisted of nine questions using a Lickert-type response scale from "not at all" to "great extent". The nine response categories, which have been analysed and documented in Tables 4.25 to 4.41 and discussed in an earlier section, were "social inclusion", "intellectual development", "self-esteem", "independence", "ability to find employment", "memory", "health", "the ability to keep up with technical changes", and "other".

Under the final category, "other", 214 of the respondents wrote remarks, with both males (n = 43, 20 percent) and females (n = 171, 80 percent) providing written responses. There were only two negative responses while the other 212 were positive.

There were 19 remarks about *teaching experiences* by male and female tutors who had enjoyed teaching at U3A. One female tutor, for example, said, "I was one of the foundation members of U3A and have valued years of tutoring here. The benefits of continuing teaching have for me been great." Several mentioned how enjoyable it was that they could continue using their teaching experience, as one respondent commented, "I have been using my teaching experience at U3A which has given me great satisfaction (I am a qualified teacher UK, was Vice Principal of a Technical College)." One respondent, with no previous teaching experience, wrote the following about her teaching

at U3A: “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.” Several remarked that U3A members are “an enjoyable group of students”.

Others mentioned the *peer teaching* aspect of U3A, of being a teacher and a student, or where the role of the learner has equal status with the teacher. They remarked that they enjoyed being tutors and students. Others remarked that teaching at U3A was a challenge as the educational backgrounds of “students” differ greatly. Several mentioned that there is such a community spirit that even with this challenge, teaching becomes enjoyable. One of the Box Hill male U3A members said: “I was among the founders of Box Hill U3A and its first President. I have usually been a tutor and a student. It has given me great satisfaction.” Another wrote, “As a student at U3A I broadened my appreciation of languages; as a tutor I derive great satisfaction in sharing my knowledge.” It appears that the original aims stated by the UK Foundation Members of the U3A are still appreciated by members (Laslett, 1996: 228): “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.” Gaskell (1999: 268) also remarked on this when he said, “Teachers and students are peers in the democratic University of the Third Age model.”

The remarks from the *students’ point of view* were also interesting. As one student noted: “I used to attend CAE (College of Adult Education) classes for years. Now, that I am older, I find U3A classes more enjoyable. They are also less expensive.” Or the comments of two respondents who were previously TAFE students: “TAFE dropped their German course and U3A was the only local alternative. Have not regretted joining. Very good tutors.” Another respondent noted: “After retirement I went to TAFE classes for some years. It was too expensive. I joined U3A. Affordable fees and excellent lecturers.” Eighteen of the respondents remarked about the “dedicated”, “excellent” and “helpful” tutors.

Others mentioned that classes are “just pure enjoyment”. Or, as this statement shows, “It is class participation without competition and stress. A group of same generation – we are

able to laugh at ourselves in a relaxed atmosphere." According to another participant, "Subjects are presented in a much more enjoyable way than I experienced at universities", and another commented: "Just pure enjoyment to continue learning and being surrounded by a lovely group of interesting, alert and caring people."

There are other members who maintain that they benefited from being on the *management committee* of U3A or helping with work in the office. One remarked, "I get most of my satisfaction from serving as a tutor and being on the management committee", and another wrote, " I enrolled in the MS Publisher course and I am now able to produce an attractive Newsletter." Others enjoyed being able to use their professional management skills: "It has been a great opportunity to use management skills developed during my working life and to know that they are appreciated at U3A."
There were also many references referring to the *kindness of fellow members* generally, and specifically for those with disabilities, as one person remarked, "The acceptance of disability, all are so kind", while another mentioned, "awareness of the care given by my colleagues to me who is vision-impaired", and still another remarked, "U3A provided a wonderful help in my recovery from a cardiac by-pass operation." Two mentioned that health problems prevented them from attending, but one of them enrolled in "Online U3A" – she enjoyed the courses but missed the usual U3A companionship.

Many of the respondents also enjoy the opportunity to be with "Like-minded and stimulating *people of own age group*". This theme of the "same age group", "like-minded people", and "similar life experiences" was one of the frequent recurring responses, was mentioned by 24 of the male and female respondents. As one stated: "It is a joy to interact with people of my own generation who enjoy learning; courses are interesting, tutors are excellent and meeting people of similar age and interest has been most enjoyable."

This presents a different view to what has been indicated in the literature review by some authors, who remarked that part of the appeal for retirees to return to education was the

social interaction with younger students (Scala, 1996: 765; Jones, 2000: 345). Both Scala and Jones did, however, refer to formal educational settings.

There also appear to be benefits not usually mentioned about learning, such as *giving structure to daily living*. This was mentioned by several of the respondents. For older adults it is important to be mentally and physically active, and these two factors were important for several of the participants. Boredom and loneliness are also factors in the lives of older adults; one wrote, "Attendance at classes gives structure to the day and to the week and stimulation to keep the mind alert and the body healthy. U3A is super." One respondent stated, "Monday morning class 'gets me going' for the week", while another, with a sense of humour, wrote: "An incentive not to stay in my unit and feed the birds." This aspect of "structure" was also mentioned by Johnson (1995: 423), who found that older students who enrolled in the UK's Open University "liked the structure and shape it gave to their days of retirement". This comment mirrors those made by the older adults interviewed by Jones and Symon (2001: 273, 280).

According to some participants, U3A has been the answer to problems they anticipated before they retired. One respondent wrote: "I am a tutor, – English Literature – teaching is fun at U3A, students are so grateful. It keeps my mind active. My great fear was being bored and lonely in retirement. U3A has totally prevented that; it provides an important change from daily routine."

There were also some other interesting aspects mentioned by the participants. A substantial number of respondents relate that learning a new language or improving a second or third language at U3A has opened new avenues for them. One stated, "Have been able to use new learned language skills on my travels in Europe"; another noted, "What I learned in Spanish 1 and 2 gave me great enjoyment when I travelled in Spanish-speaking countries". Another remarked, "The ability to read and converse in Italian is just wonderful. I am thankful to U3A for that."

One unexpected benefit for respondents was “more awareness of the *multicultural society*”. The 16 respondents who remarked on this subject were females. The greater Melbourne area has residents from 140 nations (City of Melbourne, 2006). The respondents remarked how they had benefited from getting to know people of other nationalities. A participant remarked: “U3A has given me an opportunity to have contact in class and socially with people from different ethnic and cultural backgrounds. Much laughter and shared good humour.” One respondent stated, “It has given me an opportunity to use my language skills with people from French and German backgrounds”, and another said, “It has not only broadened my mind but also my circle of friends from different nationalities.”

Some female respondents also noted how attending U3A classes had made up for a lack of education they had received in the past. One female respondent wrote, “U3A has given me a break from normal routine: to do things to learn new things – and most of all, to make up for what I missed in my youth.” Another wrote: “It has given me an opportunity to explore a breadth of interests/subjects I could not pursue while young and for which I did no have time for while employed and raising a family.”

Sixteen male and female respondents remarked how participation has been “*beneficial mentally and physically*”. One wrote about “Many years of membership, wonderful experience intellectually and health-wise”, or, as a male respondent remarked, “It helps to prevent decline in thinking power and is a good memory exercise . . . U3A provides mental stimulation and sheer enjoyment.” One person remarked about their loss of contact: “Because of a stroke I have limited U3A involvement this year. Which is sad as I love it, it has kept me mentally and physically well for years.” Another respondent summed up this aspect: “U3A has given me: pure pleasure, greater knowledge, renewed sense of power and increased mental and physical well-being.”

There is one aspect of U3A participation mentioned by several, and this is the contact with people and the learning opportunities provided throughout the year. One participant stated, “Contact with other U3A members and learning opportunities throughout the year

not just a few weeks", or as another indicated, "*Continuity of activity throughout the year* provides for good mental stimulation and social contacts." One participant wrote: "Great satisfaction, admiration, respect for the whole U3A idea and structure. It provides low cost education throughout the year. All involved display a great amount of energy and enthusiasm. It is a terrific empowerment tool for those of mature years".

While most of the remarks were similar for male and female respondents, there were differences. The remarks were similar as far as enjoyment of being a teacher and a student are concerned, how the languages learned enriched their lives, or how U3A has helped to bring structure into their daily lives, or brought interest and excitement back into their lives. There is, however, a marked difference when it comes to "enjoyment" of having contact with people from other nationalities. There were no males indicating this, while there were 16 females finding this to be true. There is also a difference when it comes to the enjoyment of "lifelong learning". There was only one male remarking, "It is always nice to meet people who maintain a keen interest in lifelong learning", while there were 14 females who saw in U3A the *opportunity to continue learning* where they had missed out as teenagers or during married life bringing up children. There was another area with nine female responses and no male responses. This dealt with a "*sense of power*", a "sense of achievement" or "confidence", as remarked by one lady: "It has given me confidence; confidence to speak up in class and in discussion groups". Another one remarked: "There are psychological benefits. Exercising the mind (not same as memory) and doing something for 'ME', not just for the family." Another wrote: "It made my life much more interesting and gave me more confidence. I also made new friends." This latter aspect, of making new friends or "socialising" had no male respondents, but there were 21 female comments. One woman stated: "I have become more outgoing, have been able to socialise. Have met some lovely and interesting people". Or, as several wrote, an "enthusiastic group, a privilege to be part of".

As mentioned earlier, there were two negative remarks by female respondents, with one remarking that she did not like the teacher she had in Tai Chi, while the other one remarked that "The term university misled me. I expected a higher standard." There were

two statements from respondents that effectively summarised this open-ended question. These two respondents felt that U3A provided participation benefits without limitations of age or lack of educational background. One wrote: "I am 96, with an MA from Edinburgh University. I moved into a retirement home and since then have had time for U3A. Has been a most satisfying experience."

Another female respondent mentioned this: "My self esteem was nil but, through being with U3A Frankston and a member of the Network Victoria Executive, I learnt how to talk to people who had much better education. I went out (as secretary, then president) to talk to clubs, etc., to encourage people to join U3A. I am not ashamed to use myself as an example of what can happen to a person who left primary school before my 13th birthday and what U3A has enabled me to achieve (including several awards). During my working life I was a dress maker." Table 4.53 displays a summary of the response to the open-ended questions.

Table 4.53: Summary of benefits experienced as result of participation by gender

Similar remarks by **MALE and FEMALE** respondents:
Satisfaction of teaching, of being a tutor
Peer teaching aspect enjoyable, rewarding
Satisfaction of being a student
Satisfaction of being on management committee
Kindness experienced – members with disability
Enjoyment being with like-minded people – own age group
Providing structure to daily life
Enjoyment of learning new or improving second/third language
Participation both mentally and physically beneficial
Contact – attending classes – throughout the year
Differences in remarks. Indicated by **FEMALE** respondents only:
Has made up for previous lack of education
Has provided sense of empowerment
Gained confidence
Able to socialise / more outgoing
Made new friends
Has provided enjoyment in learning
Contact with and understanding of people from other nationalities

4.2.3.2 Courses Participated in and 'Wish List' of Courses

This section discusses participants' responses to three open-ended questions with regard to courses and activities they attended or hoped to be offered by Box Hill and Frankston U3A.

One question was: "Write the names of the courses you have participated in this year (2005)." There was a large indication of courses that respondents had attended in 2005. It is interesting to see the diversity of courses, not only humanities, languages, arts and science courses, but a variety of health/fitness courses, games and practical courses. It appears as if U3As have attempted to offer an extensive variety of courses for mind and body.

A total of 605 respondents provided answers to this question. Of the participants, six indicated that they had to discontinue a course they enrolled in as they had to look after or nurse an ill spouse. Seven indicated that in addition to the one or two courses they attended at Box Hill or Frankston U3A they had also enrolled as associate members at one, two or even three other U3As in order to attend courses, since the U3A where they were members did not offer the specific courses they wanted. Two indicated that they had taken additional courses over the Internet with the Online U3A. Generally, the number of courses attended per respondent ranged from one to six. A list of courses in the major subject groups is shown in Table 4.54, and a detailed list of the large variety of courses and the number of respondents who indicated they had participated in this year is presented in Appendix A7.

Table 4.54: Courses attended in 2005 (major course groups only)

Disciplines Courses	Number of respondents participating
Science & Technology	
Astronomy	2
Nuclear Energy	3
Computer courses	99
(8 different types)	
Humanities	
History (variety)	122
Languages (5 different)	230
(level 1, 2, 3)	
Literature	109
(variety of areas)	
Social Sciences, Politics & others	99
Music and Art	142
Fitness / movement activities	
Walking / Tai Chi / Others	136
Games	
Bridge / Mah Jong / Others	138

Another question asked participants, "If you have attended U3A courses in any year, write the names of your favourite courses." A summary of the main categories of courses and the number of respondents is shown in Table 4.55. This question was answered by 449 of the respondents. A detailed list of the variety of favourite courses that respondents indicated they had participated in previously is displayed in Appendix A8.

Table 4.55: Favourite courses attended in the past (summary of major course groups only)

Disciplines Courses	Number of respondents
Science & Technology	
Science Courses	28
Computer courses	82
Humanities	
History (variety)	162
Languages (level 1, 2, 3)	192
Literature	83
Social Sciences / Politics	35
Management / Business	
Financial Studies	20
Music / Art	147

The following discusses the results to the open-ended question, “Which courses would you most like to see offered at your U3A? (Indicate anything that comes to mind, regardless of cost, tutor availability, etc.)” A summary of the categories of this ‘wish list’ of courses indicated by respondents is presented in Table 4.56.

A total of 370 answered this question, and 22 indicated “There are already more than sufficient courses available.” The other 348 respondents indicated a range of courses they would like to see being offered at their U3A. One would expect any ‘wish list’ with no cost or tutor availability constraints to be extensive, which this one is, but most of the categories mentioned are the same or similar to those the members had already mentioned that they had attended this year or in the past (Tables 4.54 and 4.55).

There are, however, two distinct differences: science and financial management. Of the 92 respondents who indicated that they would like to see a variety of science courses offered, 84 are male while only eight are female. In Table 4.54, which shows the type of courses respondents had attended this year, only 5 respondents indicated science, and in Table 4.55 only 28 indicated science courses. It appears as if there may be a need for more science subjects, particularly for the male members who express a stronger interest in them.

In the category “financial management”, 36 respondents felt this would be a useful subject, while in Table 4.54 a smaller number of respondents indicated “financial” courses. Here, again, there is a gender difference. Of the 36 respondents who expressed the wish for “financial management courses”, 28 are male and only 8 are female.

The full “wish-list” of all the courses the respondents proposed is provided in Appendix A9.

Table 4.56: Which courses would you most like to see offered at your U3A? (summary of major course groups only: 'wish list')

Disciplines	Courses	Number of respondents
Science & Technology		
	Science Courses	92
	Computer courses	67
	(variety)	
Humanities		
	History (variety)	116
	Languages (level 1, 2, 3)	69
	Literature	48
Social Sciences / Politics		77
Financial Studies		36

4.3 PRESIDENTS' SURVEY

The following section deals with the findings of the surveys distributed to the presidents of Universities of the Third Age in Victoria. The findings are displayed in frequency tables. There is no statistical analysis as the numbers are too small.

The surveys were distributed with the intention of answering the following research question: "Do current U3A members and U3A presidents perceive the benefits and barriers of the U3A in a significantly different manner?" The presidents' survey sought to measure administrative attitudes, views on the benefits of U3As, and any potential problems U3As might encounter.

4.1.2.1 Survey Findings

The survey for the presidents had 13 questions, including several open-ended questions. Of the 68 distributed questionnaires 55 were returned, a very respectable response rate of 80.8 percent.

4.3.1.1 Membership of Participating U3As

The first question asked for the number of members of each U3A by gender. Responses from the 55 presidents indicated that the total number of U3A members in the participating U3As in Victoria was 16,076. The number of female members was calculated to be 11,973 (74.5 percent) and male members equalled 4,103 (25.5 percent), as indicated in Table 4.57. These findings have a higher male membership than Swindell's (1991b: 5).

Table 4.57: Membership of participating U3As

Membership	n	Percentage
Males	4,103	25.5
Females	11,973	74.5
Total	16,076	100

4.3.1.2 Problems U3As Experience

The findings from the next question, "What would you consider to be the two most significant problems your U3A has?" are shown in Table 4.58. The majority of respondents (54.5 percent) indicated "obtaining tutors" was their main problem, while "classroom space" was also a concern for others (20 percent). "Obtaining members" was stated as a problem by 14.5 percent of the participants.

Table 4.58: Most significant problem for U3A

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	CLASSROOM SPAC	11	20.0	20.0	20.0
	OBTAINING TUTOR	30	54.5	54.5	74.5
	FINANCE	5	9.1	9.1	83.6
	OBTAINING MEMBI	8	14.5	14.5	98.2
	NOT SURE	1	1.8	1.8	100.0
	Total	55	100.0	100.0	

The percentage of those identifying "obtaining tutors" as a problem is very high. Dale (2001: 793) wrote: "The U3A Network survey showed that 14 percent of Victorian U3As found that finding tutors was a significant problem." Hurworth and Harvey (2001: 33) mention in their research that a quarter of U3As found it difficult to obtain tutors. McDonnell (1998a: 12) also refers to this as a problem.

In answer to the question of "where U3As could be improved" in the member questionnaire (Table 4.42), the highest score (38.8 percent) was for "types of courses offered". This question did not specifically refer to the availability of tutors, but it is possible that there is a perceived need for tutors in order to expand the range of courses offered.

Responses to the second most significant problems for U3As can be found in Table 4.59. It appears that "classroom space", with 24 percent, had the highest response rate in this list; "obtaining tutors" and "obtaining members" were second highest, both rating 22 percent, and "finance" received 16 percent. These data cannot be compared directly with the member questionnaire findings as the questions were not phrased exactly the same. The member questionnaire question (Table 4.42) about "areas where U3As could be improved" had "classroom availability" as the second highest concern (29.7 percent).

Table 4.59: Second most significant problem for U3A

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	CLASSROOM SPACE	12	21.8	24.0	24.0
	OBTAINING TUTORS	11	20.0	22.0	46.0
	FINANCE	8	14.5	16.0	62.0
	TRANSPORT FOR MEMBERS	2	3.6	4.0	66.0
	OBTAINING MEMBER	11	20.0	22.0	88.0
	NOT SURE	6	10.9	12.0	100.0
	Total	50	90.9	100.0	
Missing	System	5	9.1		
Total		55	100.0		

4.3.1.3 Type of Premises Used

U3A presidents were also asked, "What type of premises do you use?" and the responses can be found in Table 4.60. It seems that the most common premises used were local council buildings (26.1 percent), followed closely by "other" (23.4 percent). Nearly 20 percent of the presidents indicated that classes were held in the homes of members, and 11.7 percent use TAFE premises. Of those stating "other", 16 U3As use church halls, 4 Returned and Services League (R.S.L) rooms, 2 use high schools, and 2 make use of rooms in senior citizens buildings.

Accommodation problems were also a main issue in the study by Hurworth and Rutter (2000: 40), who found that U3As in Victoria operated from about 400 venues, including private homes (38 percent). It does appear, however, as if accommodation problems were more significant eight years ago than they are now. The U3A Network Victoria conducted a survey in 1998 and found that 40 percent of Victorian U3As had accommodation problems, while only 20 percent of participating U3As in this present study indicated "lack of classroom space" as a significant problem.

The U3As were also asked if they paid for their premises. The majority, 69.1 percent, of the U3As represented by the respondents paid for their premises; 30.9 percent did not.

Table 4.60: Type of premises used by U3As

Category	Code	Count	Percent responses	Percent of cases
TAFE building	1	13	11.7	23.6
University building	2	8	7.2	14.5
Local council building	3	29	26.1	52.7
U3A building	4	4	3.6	7.3
Homes of members	5	22	19.8	40.0
Retirement village	6	9	8.1	16.4
Other	7	26	23.4	47.3
Total responses		111	100.0	201.8

(0 missing cases; 55 valid cases)

4.3.1.4 Total Committee Membership

The next question asked was: "How many members on your management committee are males/females?" The responses are displayed in Table 4.61. It appears that the responding U3As had a total of 526 committee members, of whom 201 (38.2 percent) were males and 325 (61.8) were females. While there are more women on the management committees, this does not mean women are more likely to be in management. Rather, these findings reflect that women make up the largest portion of members. If the two groups are compared, it shows men make up only 25.5 percent of the overall U3A membership but are slightly over-represented on the management committees, where 38.2 percent are male. Females make up 74.5 percent of the membership, but management is only 61.8 percent female.

Table 4.61: Management committee members by gender

	N	Percent (management)	Percent (membership)
Male	201	38.2	25.5
Female	325	61.8	74.5
Total	526	100,0	100

4.3.1.5 Number of Tutors Teaching in 2005

The survey also asked about the number of tutors conducting classes this year (2005). The results are shown in Table 4.62. There were a total of 1613 tutors teaching during the year in the 55 respondent U3As. Of these, 41.3 percent (666) were males and 58.71 percent (947) were females. While these are statistically significant differences, it is interesting to note while 25.5 percent of all members of the respondent U3As are males, 41.3 percent of the tutors are males. A total of 74.5 percent of all members of the U3As are females and it seems as if 58.7 percent of the tutors are females.

Table 4.62: Tutors by gender

		Percent of tutors	Percent membership
	n		
Males	666	41.3	25.5
Females	947	58.7	74.5
Total	1613	100	100

4.3.1.6 Management Committee Positions by Gender

The answers to the next question, “List committee membership according to gender”, are presented in summary in Table 4.63. The table indicates that there were slightly more male presidents than females. Of the 53 responding institutions, 29 presidents (54.7 percent) were males and 24 (45.3) were females. Males constitute 54.7 percent of the

presidents of the participating U3As, but only 25 percent of the total membership were male (Table 4.57).

Males were far more likely to be vice presidents than females. Of the 46 vice presidents (9 missing), 63 percent are male and 37 percent female. The results were different for treasurers, and of the 54 treasurers, 50 percent were male and 50 percent female. Course coordinators are more likely to be female: of the 46 course coordinators, 23.9 percent were men while 76.1 percent were women. Much the same applies to publicity officers, who are also more likely to be female. Of the 40 (15 missing) publicity officers, 30 percent were male and 70 percent female. It is interesting to note that secretaries are also far more likely to be female. Of the 53 respondent U3As, 26.4 percent indicated they had male secretaries; 73.6 percent had female secretaries.

The present management structure of the U3A seems to conform to traditional gender hierarchies, despite women being more likely to be members. As one moves down the ladder, the likelihood of a male having the position appears to decrease. This is contrary to what Sheehy (1995: 15, cited in Williamson, 2000: 63) found: "In U3A, for example, not only is the membership mostly female, but so are the management committees."

As mentioned earlier, these findings from the survey of presidents of U3As in Victoria cannot be compared directly with the membership data as the questions and populations differ. It is, however, interesting to note that the data for "Work before retirement, by gender" (Table 4.10) show that U3A member respondents indicated that 29.9 percent of men and only 9.2 percent of women worked in management positions before retirement, and it is certainly interesting to note that 4.8 percent of men and 31.4 percent of women worked in secretarial/office positions.

Table 4.63: Management committee positions by gender

Positions	Male	Percent	Female	Percent
Presidents	29	54.70	24	45.30
Vice Presidents	29	63.00	17	37.00
Treasurers	27	50.00	27	50.00
Course Coordinators	11	23.90	35	76.10
Publicity Officers	12	30.00	28	70.00
Secretaries	14	26.40	39	73.60

What is surprising in the data of the presidents' survey is that over 70 percent of "course coordinators", "publicity officers" and "secretaries" are female. Occupants of these positions have a great amount of contact with the public and with tutors. More of a gender mix might help with attracting membership of both genders.

4.3.1.7 Advertising to Attract Members

U3A presidents were asked: "Do you advertise to attract members?" The majority, 78.2 percent, of the U3As indicated that they advertised to attract members; 21.8 percent do not advertise, as shown in Table 4.64. The analysis of the member questionnaire (4.2.2.8, Table 4.46) showed that 31.8 percent of the respondents did not join earlier as they had not been aware of the existence of U3A. However, these results only apply to the sample of two U3As. But it is not only in Victoria, Australia where the public is not well informed about U3As. Pitman (2006: 26), in the British magazine *The Oldie*, comments on U3As in Britain as follows: "Is it possible for 155,000 people to keep a secret? I wish everyone knew about it. Yet it's all done quietly, by word of mouth. 'It's a hidden treasure', enthuses their press officer."

Table 4.64: Advertising to attract members

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	YES	43	78.2	78.2	78.2
	NO	12	21.8	21.8	100.0
	Total	55	100.0	100.0	

4.3.1.8 Provision of Courses Aimed at Specific Gender

Results to the question "Does your U3A provide courses that are specifically targeted to a particular gender?" are presented in Table 4.65. Surprisingly, it appears as if there is little attempt made to provide courses appealing particularly to one gender. The results are interesting: of the 53 U3As surveyed only 2 (3.6 percent) indicated "Yes", while 53 (96.4 percent) indicated "No". A few had underlined the question in the survey and added "No" in large letters, while one stated "Never" (underlined).

Table 4.65: Courses aimed at specific gender

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	YES	2	3.6	3.6	3.6
	NO	53	96.4	96.4	100.0
	Total	55	100.0	100.0	

As mentioned earlier, it has been suggested that it might be necessary to use gender-specific strategies in order to encourage older men to participate in educational programmes. NIACE (2002: 4) states: "The number of older women learning far outweighs the number of older men. Gender-specific strategies need to be employed to reach older men." Williamson (2000: 63) focused on gender difference, finding courses offered by U3A "sometimes reflect the interests of the female membership, which leads some critics to suggest that offering courses suited to men's interests might attract more

of them to join". In this study it is interesting that in the open-ended member questionnaire results (Table 4.56) showing the courses members wish their U3A would offer, 84 of the 92 respondents were males who wished for a variety of science courses to be offered, while 8 were female. There is also the fact that in the member questionnaire, the responses to "areas where U3A could be improved" (Table 4.42) show that the highest score is in the category "types of courses offered" with 38.8 percent. The particular question did not ask for specifics about course categories, but it appears, looking at the 'wish list', that men predominantly wanted science-based or financial courses.

4.3.2 Responses to Open-ended Questions

The presidents' survey included several open-ended questions. One was, "Is there anything you do specifically to increase male membership?" Only 10 of the 55 U3As (18.18 percent) responded to this question. It does appear as if a few do make special attempts to attract male members. There were both positive and negative responses to this question. One remarked, "Yes, the course coordinator promotes science courses, computer courses and financial-interest courses to balance a plethora of art/craft courses that are offered." Another respondent felt it was important to specifically target men as they were a minority in their membership. One U3A had a course specifically titled "Men's Meeting Place". Several of the respondents felt they needed guidance on how to attract and retain men as members.

There are others who see the situation in a different light, as one commented, "We don't discriminate on any grounds either positively or negatively", while another wrote, "There is nothing one can do about it, statistically women live longer. We encourage male members but the balance in mature age people will always leave males very much in the minority" (this particular U3A has among its members only 6.25 percent males). While it is true that women do live longer, the loss of males occurs primarily in the 75+ age group.

Another open-ended question in the survey was, “What in your opinion are the main contributions U3A makes to the life of its members?” Many of the presidents felt that personal, mental, and physical improvement were key benefits of the U3A. The majority of remarks given by respondents in the presidents’ survey are similar to the remarks given by members in the member questionnaire. Both groups saw personal, mental, and physical improvement as the key benefits of U3A participation. Remarks by the presidents showed that they saw the benefits in a wider and more encompassing way. Implications for the community meant that support systems were provided for members.

One participant wrote about the positive aspect of the satisfaction that members experience by volunteering to help with U3A activities. Others remarked that the kind of volunteering they do goes beyond the walls of the U3A and into the community, with visits to schools and elder citizens’ homes. One remarked that being involved in U3A provides “generally a stronger association and feeling of belonging to the local community.”

There are a number of aspects that were mentioned by members and also remarked on by the presidents, such as the importance of the “all-year round” or “regular meetings” throughout the year. One remarks, “Because classes are throughout the year members get to know each other and this creates great social support between members”, or as one respondent commented, “It provides stimulating activities on a regular basis”, and “long running courses give structure to members’ lives.”

These are important aspects and present one of the positive points of U3A. As mentioned earlier in this study, not all educational models for older adults conduct courses throughout the year. Although U3As are autonomous organisations and not all function in exactly the same way, the majority of the 55 respondent U3As conduct activities on a regular basis throughout the year, except for short breaks over the Christmas period and one or two short breaks during the year at the end of a term or semester.

Eight of the 55 respondents remarked that members frequently mentioned that they did not have the opportunity to study seriously during their younger years or during their working lives and were now grateful for this opportunity. One wrote, “Many members have mentioned that they have been wanting to learn certain subjects all their lives but didn’t have the opportunity, time or financial support to do so.”

The other area that is frequently mentioned is the “social aspect” that U3A provides for its members. Typically, the social aspect of learning is not thought of in the context of lifelong learning, but the courses, activities, games, and social gatherings provide not only intellectual stimulation but also bring enjoyment into the lives of members. One president noted, “It keeps bodies and minds active and stimulated”, while another remarked, “We not only provide courses which provide intellectual satisfaction, we also offer courses to improve physical fitness and social activities to bring enjoyment into the lives of our members.”

A number of remarks included the importance of being the tutor or being on the management committee. Taking a leadership role instils a sense of challenge, satisfaction, and of being valued. One remarked, “It is always pleasing to find a wealth of knowledge hidden that can blossom in tutorials.” One president summed up the contributions of U3A with these words: “We have found that U3A contributes to life for all of us who wish to continue learning and meeting people in a stimulating, enjoyable way. U3A contributes to mental stimulation, socialisation, prevents isolation sometimes found in retirees, aids physical as well as mental health, and contributes to the community.”

4.3.2.1 Courses Conducted by Participating U3As in 2005

The last open-ended question was, “What courses has your U3A conducted this year?” This question was answered by 52 of the 55 respondent U3As. There were 295 different types of courses conducted by the U3As for the year 2005.

However, this does not give the full picture, as in many of the larger and medium-sized U3As, courses may be duplicated and conducted several times per week. In addition to the courses offered throughout the year, U3As also conducted many short courses, day trip sessions, visits to galleries or features of historical interest, and weekly or monthly guest speaker sessions for the members. There are a few U3As that only offer weekly talks by guest speakers or talks given exclusively by their own members on topics of their own choice.

An extensive list with all the types of courses that have been conducted during 2005 by the participating U3As is presented in Appendix A10. The table shows there were courses offered under more than 30 disciplines, with the greatest number of courses in the areas of history, languages, computing, literature, craft/handicraft, games and music appreciation. The discipline of science is not well represented; apart from geology and astronomy there are only a small number of science courses. The same applies to courses in economics and finance.

4.4 FURTHER DISCUSSION AND SUMMARY

This chapter analysed the results from the surveys of members from two Universities of the Third Age, and of the presidents of the U3As in Victoria. Analysis of the data collected in the surveys provided answers to the research questions.

4.4.1 Summary of Findings: Member Questionnaire

There are some interesting findings in the 627 returned member questionnaires. All independent variables, or demographic data, show marked differences between the genders in all categories. Female U3A members outnumber males by a large margin of 76.7 percent to 23.4 percent. Women in this sample tended to be younger than men. The mean age for males was 73.28 and for females it was 70.28. The majority of members are married.

There were significant differences in educational attainment for men and women, with 20.8 percent of women completed an undergraduate university degree compared to 32 percent of males. The “work before retirement” data also show interesting gender differences.

The dependent variables focused on why participants became U3A members, what courses they participated in, and what the perceived benefits were as a result of participation. The rate of participation in U3A activities was similar for both genders in 2005. Both groups rated the benefit from participation similarly as generally high, with women indicating more positive responses and males generally responding a bit more negatively.

There are significant differences in the reasons why men and women joined U3A. Men join more for “gaining knowledge” (72.1 percent) than women (69.6 percent), and women have higher scores for “personal satisfaction” and “making new friends”. Both groups showed similar scores for “classroom preferences”.

Some of the nine-scaled Likert-type questions dealing with “improvement in the life of members due to participation in U3A activities” showed mixed results; some data showed differences between the genders while others did not. The scale “social inclusion” shows statistically significant differences in all categories for males and females. Interestingly there were no significant differences in the perceptions of males and females on the question of “intellectual development”. Participation led to “increased memory”, however, showed significant differences for both genders.

There were similar results for both genders to the question of whether participation “increased self-esteem”, while there were statistically significant differences in the scores for participation “increased independence”; women feel more strongly about this. Significant differences were also found in the “health” category, where women had higher scores. Both groups showed similar results in the category participation “increased ability to keep up with technical change”.

A considerable number of significant differences in the findings have been indicated above in answer to the first part of the research question, “Do male and female members of the U3A have significantly different perceptions as to the contributions of the U3A to the lives of older adults and the barriers to participation?”

There were also findings that could be seen as “barriers to participation”, in response to the second part of the research question. One of these is the analysis of the question “where U3A could improve”. The categories: “Improvement in types of courses offered”, “Classroom availability” and “Quality of tutors” were all rated highly by both genders. All three of these categories may be seen as barriers to participation.

The question of why members had not joined U3A at an earlier stage also showed interesting results, with 31.8 percent indicating that they had been unaware of the existence of U3A, and the other category which showed a significant gender difference was that more men than women had delayed joining U3A due to “negative previous educational experiences”. Both aspects can again be seen as “barriers” to participation.
It is interesting to note that the majority of tutors in the members’ sample are men, but the majority of participants are women; this again was a statistically significant difference. There was, however, no difference in the percentage of male and female participants who served on management committees.

The member questionnaire also had several open-ended questions. The analysis shows many similarities between the genders, but there are also marked differences. Similar remarks from both genders were found in terms of the satisfaction of being a student, the satisfaction of teaching, and the peer aspect of teaching. Serving on the management committee was also seen as interesting by both males and females. Both groups of participants also liked being with similar minded individuals, enjoyed being with their age group, and stressed the importance of U3A having added structure in their lives.

There were also aspects indicated by a proportion of females only: the satisfaction of U3A made up for a lack of education in their youth. They also indicated that they gained confidence, made new friends, were more outgoing, and enjoyed the social aspects. They also appreciated the contact with people from other nationalities.

4.4.2 Summary of Findings: Presidents' Survey

Finally, this study wanted to know if there were differences in the perceptions of U3A presidents and participating members. The majority of remarks given by the respondents in the presidents' survey are similar to the remarks given by participants in the member questionnaire. Presidents indicated that obtaining tutors was the main problem, with 54.5 percent indicating this; classroom space and obtaining members were also seen as problems.

It is interesting to note that the majority of tutors of the 55 respondent U3As in Victoria were male, but the majority of members of these U3As were female. On the U3A managing committees, more managerial positions were occupied by males while a high percentage of females on the management committee were in secretarial positions. This showed the same trend as the "work before retirement" data in the member survey.

The presidents indicated that they do advertise their U3A. It is however interesting to note that some U3As have problems attracting members, and that the U3A members' survey showed that many of the members had not been aware of the existence of U3As before they joined.

Only a minute number of U3As developed or delivered gender-specific courses. It appears as if some U3As do not offer them, as they perceive it as discrimination.

The responses to the open-ended questions were very similar for both presidents and U3A participant members. Both groups saw intellectual, personal, social, and physical improvement as the key benefits of U3A participation. However, presidents saw these

benefits in a wider, more encompassing way, with community ramifications of providing support systems for members.

CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS

5. INTRODUCTION

This concluding chapter highlights the overall findings of this study. An overview is presented, followed by a review of the findings and how they relate to the research questions. A literary review and the methods of investigation are also presented. This is followed by recommendations for the improvement of U3A practices based on the findings, and suggestions for areas of further research are delineated.

The major thrust of this study was to investigate the contribution of the University of the Third Age to lifelong learning for older adults in Victoria, Australia. This study evaluated whether, as earlier research suggested, U3A programmes represent a viable method of addressing the lifelong learning needs of a sample of older adults, and provided an exploration of those adults' perceptions of the value of U3A. Additionally, I examined possible barriers to participation in U3A, especially among the males, who are far less likely to belong than females.

5.1 OVERVIEW OF MAIN FINDINGS

The quantitative study was primarily based on the findings of two surveys, one of the members of two U3As, and one of the presidents of the U3As in Victoria.

In finding answers to the research questions, several sub-questions were addressed (3.1.1). The first sub question: *What educational models are available to older adults?* is discussed in 5.1.1, Summary of Literature Study.

The following section provides answers to the second sub-question:

- *What do current U3A members feel are the most important contributions of participation in U3A to the lives of older adults and what are the most significant barriers to participation?*

Based on the survey responses, U3A members appear to feel that U3A participation has made a significant difference to their lives: 96.4 percent of the respondents indicated so in the categories from “some extent” to “great extent”. The responses to the open-ended questions also illustrate that respondents saw mental and physical improvement as the key benefits they had obtained from participating in U3A activities.

Respondents also cited psychological benefits from participating in U3A activities. The data obtained for the question “social inclusion” showed a total response rate of 90.3 percent for the three categories of “some extent”, “more extent” and “great extent”. The same applied to the questions of “intellectual development”, “self-esteem” and “increased memory”, where the data obtained had response rates around 90 percent, while “increased independence” was listed by 63.7 percent of respondents. The category participation allowed them to “keep up with technical change” had higher scores for the older than the younger participants.

Apart from educational benefits there were also the many beneficial social aspects of mixing with same-age and like-minded people, and meeting people from other nationalities. The benefits and fun aspects of involvement in games, as well as indoor and outdoor physical activities, like dancing or bushwalking, were also considered to be important.

Some aspects could be seen as barriers to participation. In the literature review several models explaining participation barriers were discussed. Darkenwald and Merriam (1982: 137, cited in Findsen, 2002) categorised these barriers as *situational, institutional, informational* and *psychosocial.*

Responses to the question “where U3A could be improved” showed several areas that could be seen as *institutional* barriers. A high percentage (38.8 percent) of participants indicated that there could be improvement in the types of courses offered, and nearly 30 percent indicated that classroom availability was a problem; 16 percent also indicated that

the quality of tutors could be better. These responses indicate problem areas which might discourage prospective applicants from becoming U3A members.

The problem area "type of courses offered" may be the result of difficulties in obtaining sufficient tutors in specific subject areas. Table 4.56 shows the 'wish-list' of courses illustrated, for instance, that males would like to see more science and financial/economic subjects available. The two participating U3As, Box Hill and Frankston, offer a large variety of around 40 different courses at each institution, conducting 6 to 12 different courses per day. There are no science or financial/economic courses, but they do offer a range of computer courses: one U3A offers MS Word at beginner level, while the other U3A offers seven different levels of computer courses.

The analysis of the question: "Why members joined U3A" provided insight into an *informational* barrier where a large number of the respondents (250) indicated a lack of awareness of U3A before they joined. This high rate suggests that the community is not well informed about U3A's existence and its activities, even though 78.2 percent of participating U3As indicated that they advertised in order to attract members. Some participants did not join earlier because they thought they "were too old to learn"; this belief falls under the category of *psychosocial* barriers, or individually-held beliefs.

The following section provides answers to the specific research question relating to male participation in U3A programmes:

- *Do male and female members of the U3A have significantly different perceptions as to the contributions of the U3A to the lives of older adults and the barriers to participation?*

Answers to this question have been explored in great detail in the findings of Chapter 4. I will therefore provide only a summary here.

There are marked differences in the data between male and female respondents; these differences are noticeable in the demographic data where male participants had a

significantly higher “educational attainment” than females, especially in the university education category (4.2.1.5). There are also statistically significant differences in the “work before retirement” data, with the main difference being in the managerial and secretarial/office position area. These two aspects, “educational attainment” and “work before retirement”, may have an influence on the availability of tutors and the pattern of U3A management.

Males and females also differed in their view of why they joined U3A (4.2.2.4); while both groups became U3A members mainly for gaining knowledge, women had higher scores than men for “personal satisfaction”, “making friends”, and “escaping daily routines”. The same aspects were mentioned in the responses to the open-ended questions, where socialising and meeting people from other nationalities appeared to be important for women but less so for men (4.2.3.1). The data indicating life enhancement in the categories of “social inclusion”, “independence”, and “health” all showed statistically significant differences between men and women (4.2.2.6). It is also interesting to note that in a number of the findings males, while appreciating the benefit, appeared to be more negative in their evaluations, while women were more positive.

There were also statistically significant differences shown in “reasons for not joining U3A at an earlier date”, with men scoring 14.3 percent in the category “negative experiences in previous educational circumstances”, while women had scores of only 6.9 percent (4.2.2.8). This could also be seen as a *psychosocial* barrier. This has been well described by Stuart-Hamilton (1998: 67), who stated, “We are what we are because of what we were” – negative experiences in childhood still influence participation in education in later life.

Statistically significant differences were also shown in the number of respondents who served as tutors. Of those who served as tutors a high percentage had undergraduate and/or postgraduate degrees (Table 4.50). Males in the sample had higher educational attainment than females, and were therefore more likely to have served as tutors. There

was also a difference in the type of courses that participants would like to see their U3A provide (Table 4.56).

The findings from the data also provided some answers to the following research question:

- *Do current members and U3A presidents perceive the benefits and barriers of the U3A in a significantly different manner?*

The responses to both the closed and open-ended questions of the U3A members' questionnaire and the presidents' survey showed that members and presidents viewed the key benefits of U3A in similar ways, as the remarks given by both were similar. Many of the presidents felt that personal development, intellectual satisfaction, and physical improvement were key benefits of the U3A, and the responses from the members concurred. The only difference was that presidents, because they are more involved with the administration, planning and running of the U3A, provided more information about administration, teaching and potential problems their respective U3As faced. They also saw the benefits of U3A in a wider more encompassing way, with community ramifications.

There were two aspects which members and presidents indicated as problems, both of which could also be seen as barriers to participation in U3A activities. U3A member participants referred to "types of courses offered" (38.8 percent) as something which could be improved (4.2.2.7); while presidents in the survey (54.5 percent) indicated obtaining tutors to be the main problem (4.3.1.2). While the questions are not exactly the same, it appears as if there are "tutor availability" problems preventing U3As from offering an even greater variety of courses.

The last open-ended question was "What courses has your U3A conducted this year?" This question was answered by 52 of the 55 respondent U3As. The courses conducted by the participating U3As are extensive. For the year 2005 they amounted to 295 different types of courses. The courses offered were from more than 30 disciplines, and because of

the demand some of them were offered several times per week. An extensive list of all the courses that U3As offer is displayed in Appendix A10.

The other problem indicated by both groups was “accommodation” or the “availability of classrooms”. Classroom availability was indicated as a problem by 29.7 percent of the participants, and also by 20 percent in the presidents’ survey. This could be seen as an *institutional* barrier to participation. However, there has been some improvement in this area as a previous survey, conducted by the U3A Network Victoria in 1998, showed this to be a problem with 40 percent of the Victorian U3As.

5.1.1 Summary of Literature Study

Research interest in education for older adults is a relatively recent area of interest in the academic community; and yet, older adults are retiring earlier and demonstrating interest in taking up learning opportunities. While governments have shown an interest, lifelong learning (as indicated in 1.1), is still only seen as a necessity for economic survival (Wain, 2001; Withnall, 2000).

Educational learning models have been developed for older adults, as discussed in Chapter 1 (cf. 1.1.1; 2.2) of this thesis. There are notable differences between the main examples: Elderhostel (cf. 1.1.1; 2.2.2), the Institute of Learning in Retirement (ILR) (2.2.3), and the University of the Third Age (cf. 1.1.1; 2.2.4)

Third Age learning is seen as non-vocational (cf. 1.1.1) and aimed at fulfillment and the pursuit of leisure. Research has shown that such learning provides multiple benefits for older adults (1.1.1) (Jarvis, 1998, cited in Dale, 2001), including mental and physical improvement, and increased confidence and self-esteem. Others have mentioned the importance of social contacts and relationships as positive outcomes related to learning activities (Aldridge and Lavender, 2000; Antonucci and Akiyama, 1991; Swindell, 1999; Andrews, Clark, and Luszcz, 2002; Dench and Regan (2000).

Barriers that prevent older adults from continuing with lifelong learning were also discussed in Chapter 1. The percentage of retirees in Australia was shown (1.1.1.1), along with the small percentage of retirees who are U3A members (McDonell, 1998b, cited in Dale, 2001), and models to explain participation barriers were displayed. The categorisation of the barriers to participation formulated by Darkenwald and Merriam (1982, cited in Findsen, 2002) have been used in this thesis; lack of awareness (informational barrier) and stereotypical images (psychosocial barriers) have been seen as obstacles to lifelong learning (Cross, 1981; McGivney, 2004; Findsen, 2002; Carlton and Soulsby, 1999).

The lack of male participation is an important factor in this thesis (1.1.1.1), and may lead to the possibility of female "dominance" in educational institutions for older adults. Some authors see this as being due to "lost educational opportunities" for females (Williamson, 2000; Scala, 1996). Swindell (1991) found, however, that female U3A members had a higher than usual educational background (1.1.1.1). Others found (1.1.1.1) that the feminisation of U3A programmes constituted barriers of participation for men (Gorard et al., 2001; Cusack, 1998).

The implications of weak male participation have been discussed (1.1.1.2) (Hurworth and Harvey, 2001), and some saw it as a problem for obtaining tutors, since men, as McDonell (1998b) states, "have until recently dominated fields of employment and knowledge".

Chapter 2 assessed the meaning of old and third age (Swindell, 2002; Williamson, 2000), and it was reasoned that for this study the term older adults should be used. The term lifelong learning was analysed (2.1), and generally does not refer to the stages from pre-school to old age, but only up to the end of working life (cf. 1.1.1). Attempts to correct this were discussed with lifelong learning now seen as serious leisure, as fostering social contacts and providing potential benefits (1.1.1) for older learners.

The meaning of the terms educational gerontology (made official in the UK in 1985), gerontological education, and the recently new theoretical model, gerontagogy, were discussed. This section (2.1) showed that there has been an upswing of interest by gerontologists in how to serve and use education processes in order to guide older people (Lemieux and Martinez, 2000).

In section 2.1.1 successful aging was reviewed, and a difference in perspective was shown: some see aging successfully as mainly associated with avoiding poor health and functional disabilities, while others see aging as an adaptation process involved in adapting to all of life's changes, the biological, physical, cognitive, emotional, and social (Anstey et al., 2002; Frazier et al. 2000; Pinquart, 2002b). According to Seiffert (2002) and Lim (1988), education is essential for successful living, as it brings benefits of social integration, sustains self-esteem and develops mental strength (cf. 2.1.1; 1.1.1).

Section 2.1.2 dealt with adult development and the "selective optimization with compensation" theory (Baltes et al., 1999). Of interest to the current research is the application of the theory to intellectual development and, particularly, cognition. Baltes et al. (1999) conclude that older adults could demonstrate considerable gains from education.

Involvement in purposeful activities is seen as essential (2.1.3). The importance of people not becoming marginalised was discussed, as marginalisation compounds the disadvantages of dealing with a changing world. Carlton and Soulsby (1999) believe that education has to be available, especially for older people, as it "can lead to new directions for their personal development" and help them to sustain active and independent lives.
A few studies in section 2.1.4 dealt with motivation and participation in education in later life. Some authors have studied the educational expectations of cohorts and discussed the *silent generation*, and their preferences for educational experiences, as stated by Strauss and Howe (1991, cited in Grabinsky, 1998), and Young (1999, cited in Gaskell, 1999), who discuss the preferences for formal versus informal educational experiences.

Also in section 2.1.4, Jones (2000; cf. 1.1.1) observed the need for daily structure and social interaction. Jamieson et al. (1998) found in their survey of over 60 year olds that intellectual challenge (cf. 2.1.2) and meeting new people were the reasons for participating in education programmes, and Abraham (1998), in an Elderhostel survey, found that "social interaction" (cf. 1.1.1) was the predominant desire. Jones and Symon (2001) believe that the concept of retirement needs redefinition, and Stebbins (1992) refers to this type of post-retirement learning as "serious leisure" (cf 1.1.1).

Research on learning style, or the manner students respond to the learning environment, was discussed in Section 2.1.6. They referred again to the silent generation (2.1.4) (Grabinski, 1998) preferring rote learning as a method of taking on new information.

Section 2.1.7.1 to 2.1.7.2 described psychological and social factors influencing the participation of older adults and the benefits they receive from education in later life. The main themes that arose were loneliness, social relationships, social networks, peer friendships, self-esteem, self-image, confidence and independence. There is a strong suggestion in the literature that education in later life and social relationships are deeply intertwined. The importance of social needs in later life (cf. 1.1.1; 2.1.1; 2.1.4) has been documented by Anstey et al. (2002), Vaillant, (2002), and many others. They believe that aging well depends fundamentally on the quality of social relationships. Swindell (1999) concluded from his review of the research that well-being and social networks have been consistently shown to be positively correlated.

The U3A educational model is considered to be particularly effective because of its support of social networks within individual U3A groups (cf. 2.1.7.1), and social relationships with peers who have common interests (Swindell, 1999). Others have also found that peer friendships in later life are critical to positive self-image, confidence, and self-esteem (Blau, 1986, cited in Hall-Elston and Mullins, 1999). In addition, the literature explored researchers' findings of how social relationships affect well-being (Pearlin and Turner, 1987; Sarason, Sarason, and Pierce, 1990; Antonucci and Jackson, 1987, cited in Antonucci and Akiyama, 1991).

Section 2.1.7.2 discussed *role identity* and the problem that there are no clearly defined roles for the elderly in Western society, which can lead to reduced self-esteem and other psychological effects. Anstey, Luszcz, and Andrews (2002: 86) studied psychosocial well-being in terms of self-esteem, morale and perceived degree of control and found that overall satisfaction with life was inseparable from health and physical function.

Loneliness was also discussed as a major theme in the literature on aging. Pinquart and Sörenson (2001) found that individuals with higher levels of self-confidence and involvement in meaningful activities were less likely to report that they felt lonely.

The concept of independence was discussed in 2.1.7. In the studies of older adults engaged in educational activities, independence is invariably associated with older adults' perceptions that they have control over their lives, and with this sense of control comes a sense of freedom, as discussed in Searle et al. (1995), and in Price and Lyon (1982, cited in Kolland, 1993).

Section 2.2 discussed in detail the well-known educational learning models that have been established. The Elderhostel movement in the USA (cf. 1.1.1; 2.2.2; 2.2.5.4) provides significant travel opportunities. The teaching is usually provided through week-long, low-cost, non-credit courses by academics on academic campuses (Stephan et al., 2004; Baires, 1996).

The Institutes for Learning in Retirement (ILR), also in the US (cf. 1.1.1; 2.2.3; 2.2.5.5), independent organisations affiliated with a college or university and offering college-level courses, were discussed. The members participate in all aspects of curriculum design, instruction, and administration (Nordstrom 2002; Manheimer et al 1995; and others).

There was also detailed discussion about the University of the Third Age, which originated in France as L'Université du Troisième Age in 1973 (cf. 1.1.1; 2.2.4.1). University faculty on traditional campuses conduct courses for third age students (Vellas,

2003). In addition, numerous European Universities offer Third Age education programmes. This study was not an attempt to make comparisons between them and decide which is more suitable for older adults. There are, however, some aspects where the British U3A model, also used in Australia, differs from the others.

In 1981 the British version of the U3A (cf. 1.1.1; 2.2.4.2; 2.2.5.2), was established in Cambridge, England. This education model is based on self-help and self-sufficiency (Laslett: 1996), and is not usually affiliated with traditional education institutions. There are similarities between the British U3A and the ILR: both programmes reflect an egalitarian, self-help model philosophy. The peer teaching and self-help philosophy, as a rare and provocative model of education, was discussed in section 2.2.4.2 (Brady et al., 2003; Midwinter, 2003; Manheimer, 2002).

The next section of the literature review (2.2.4.3) discussed the establishment of the U3A movement that began in 1984 in Melbourne, Australia (Network Victoria, 2004). It showed that in 2004 there were well over 50,000 U3A members in Australia. The state of Victoria now has 68 U3As with approximately 18,000 members. The literature review then discussed in detail the administration of U3As (2.2.4.3.a), indicating the minimal operational costs due to the volunteer aspect for management, teaching and office positions (Swindell, 1999). This was followed in section 2.2.4.3.b by a discussion of teaching in U3As, the peer-teaching aspect, and a short discussion about the range of courses offered by U3As.

The fact that accommodation remains a problem for many U3As (Hurworth and Rutter, 2001) was discussed in section 2.2.4.3.c. Providing appropriate facilities with an increasing membership was commented on as a problem for some U3As.

The cost of membership was dealt with in 2.2.4.3.d. One of the most positive aspects of U3A is the low, affordable membership fee and the fact that there are no course fees. From a financial point of view it makes it affordable for all. The insurmountable costs of regular university fees for older adults were also mentioned.

The literature study then discussed the French U3A model and some European variations (2.2.5.1). Many U3As in Europe, or Universities for Seniors, follow the original 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 students have to pay, the programmes offered by universities, and the hours students can attend per annum vary greatly. Frequently the courses offered are "based on the assumed needs and interests of older persons" (Formosa, 2000).

The British U3A model was then discussed (2.2.5.2) and how it very much retained the design and philosophy of self-help, and total control of the U3A in the hands of Third Agers (Midwinter, 2003). This occurred not only in the UK, but also in Australia, New Zealand and South Africa.

The review in section 2.2.5.3 discussed some similar or hybrid models or third generation U3As models (Lemieux, 1995) which have emerged in Finland (Yenerall, 2003), China (Baoku, 2002; Swindell and Thompson, 1995) and in Taiwan (Huang, 2003). Elderhostel (2.2.5.4) and Institutes of Learning in Retirement (2.2.5.5) were then discussed and how they have retained their original principles.

The last section of the literature study (2.3) discussed barriers to participation in lifelong learning for older adults: stereotypical images as portrayed by media and others; lack of awareness of the existence of learning opportunities; negative education experiences and other possible barriers (Lamdin, 1997; Stuart-Hamilton, 1998; Cross, 1981; and others).

5.1.2 Empirical Investigation

The study was quantitative and relied on results obtained from two surveys. One was a five-page questionnaire with 18 questions sent to 987 members of two Universities of the Third Age in Victoria with a return rate of 627 (63.5 percent). The other was a survey of

13 questions sent to the 68 presidents of U3As in Victoria with a return rate of 55 (80.8 percent). While the survey research for members and presidents of U3A is quantitative, there were 11 open-ended questions where the participants expressed their views on certain issues.

The aim of the study was to look at the contributions that U3A makes to the life of its members, what the barriers to participation are, and how participation in general, and specifically of men, is and can be encouraged.

To collect data there are generally two types of research approaches in the educational field, qualitative and quantitative, that can be used. The quantitative approach has been used for this study. There are certain important aspects of quantitative data collection that made it appropriate for this study. Patton (2002: 14) maintains that quantitative data make it possible to measure a large sample using a limited set of questions, facilitating comparison and statistical aggregation of the data, and producing a broad, generalisable set of findings. In this study nearly 1 000 questionnaires were distributed.

According to Cohen et al. (2000), Patton (2000: 231), and many other authors, the representativeness of a chosen sample is another important factor: “With both qualitative and quantitative data, the essential requirement is that the sample is representative of the population from which it has been drawn” (Cohen et al., 2000: 95). The two participating U3As chosen as a sample were representative of the broader target population comprising all U3As in Victoria. Both U3As have mixed membership, as have all U3As in Victoria. Both have been in existence for nearly 15 years.

For this research method, validity was another important factor. For quantitative data, validity depends on careful instrument construction to ensure that the instrument, in this study the two questionnaires, measured what they were supposed to measure. The advantages of questionnaires over interviews are discussed by Cohen et al. (2000: 269), who maintain that questionnaires encourage greater honesty, because of their anonymity;

the disadvantage is frequently a low return. This was not a problem with the questionnaires in this study; the return rate was very acceptable.

The design of the questionnaires was an important consideration in order to ensure validity and a good return response. Charles and Mertler (2002: 162) mention that questions used in surveys are sometimes open-ended and frequently accompanied by pre-selected response choices. For this study the majority of questions were structured, but some of the questions were open-ended to enable the participants to respond in their own words.

The first stage of data analysis was to judge the appropriateness of the survey instruments. For this reason, great care was taken in the pre-testing of both instruments during the pilot stage, which also involved careful wording of instruments and accompanying letters, and assurance of the anonymity of survey distribution. The member questionnaire was a structured instrument with 18 questions, generating independent and dependent variables for analysis, and the survey for U3A presidents, also a structured instrument with 13 questions, generated data concerning the demographic make-up and structure of U3As.

Having considered the validity and reliability of the member questionnaire and the presidents' surveys, statistical analysis of the data were then carried out in order to seek answers to the research questions. Analysis of the quantitative data collected from the member questionnaires was conducted, in the main, using SPSS. Frequency tables and other descriptive analyses and charts were produced in order to obtain an overall picture of the data collected. The majority of variables included in this study were categorical, and chi-square analysis and cross-tabulation of data were used. Cross tabulations and chi-square tests of independence were used to test for statistically significant relationships between all categorical independent and dependent variables. Inferential tests (t-tests) were used to compare age differences between two groups of respondents. ANOVA was used to test for statistically significant mean differences in age between more than two groups. The tables illustrate the findings.

The major computer analysis was mainly applied to the member questionnaire; much of the U3A president/committee survey was hand tabulated.

5.1.3 Key Findings of Empirical Investigation

The findings of this study demonstrate that there was a high level of satisfaction among participating U3A members and presidents with the activities that U3As provide. Members felt there were significant benefits from participating in U3A activities (4.2.2.2; 4.2.2.6.a to 4.2.2.6.h), and presidents showed a similar response. The remarks to the open-ended questions showed a high level of appreciation for U3A activities (4.1.1.3). The high level of annual re-enrolment and the number of years members have continued their membership demonstrate a continued commitment to the U3A concept (4.2.1.7).

Difficulty in obtaining tutors appears to be a problem in most U3As in Victoria. As mentioned before, the original idea of Laslett (1996: 228) was that "those who teach shall also learn and those who learn shall also teach". From the findings of this study it appears, however, as if only a small percentage of members accepted teaching commitments (Table 4.48). The presidents' survey showed the difficulty in obtaining tutors (4.3.1.2) as the most significant problem U3As in Victoria experience. The other area closely related to tutors was the "type of courses being offered" (4.3.1.2).

The male/female membership ratio in U3As presents a problem (4.2.1), and it appears as if this may remain a problem for some time to come. As shown in the literature review, it has been suggested that gender-specific strategies could be employed in order to encourage male participation. Williamson (2000: 63) and McGivney (2004: 89) suggest that some programmes be designed with men in mind. The findings of this study showed that only 3.6 percent of U3As surveyed indicated they were providing courses specifically targeted at one gender (4.3.1.8). The findings also showed a lack of science-based and financial courses (Table 4.56).

The literature shows that very few studies deal with the male/female ratio, and explanations or corrective measures have not really been provided. The usual response is that “women live longer” (Hurworth, 1995: 37; Midwinter, 1996: 34–35); this was also what one of the presidents of a participating U3A stated in this survey. It is a well-known fact that women do live longer, but this does not explain why there is such a low membership ratio among the young group of U3A members. In this study a higher percentage of females were in the lower age groups, and the percentage of men was higher in the 70 to 80+ age category (Table 4.4).

Midwinter tried to explain the imbalance in terms of women seeking companionship, since the majority of U3A members are single, divorced and widowed women (1996: 35, cited in Williamson, 2000: 52). This does, however, not fully apply to the participants in this study (Table 4.5).

There appear to be many factors that may be responsible for the male/female ratio. This study has shown that the interests of men and women differ. Apart from strong emphasis from both groups in joining U3A “to gain knowledge” (4.2.2.4), the genders showed marked differences in their interests and perceptions. The open questions (4.2.3.1) showed some similar responses, but also marked differences.

The conclusion I have come to regarding the male/female ratio, based on the findings of this study, is that more attention needs to be paid to the lifelong educational needs of older men. In this cohort, men had more opportunities in their youth to obtain higher educational qualifications than females, and in this study male member participants have higher educational attainment than women (4.2.1.5). Among the member participants, a higher percentage of men served as tutors (4.2.2.9), but there was no gender difference in those that had ever served on management committees (4.2.2.10). The presidents’ survey, however, illustrated that there were slightly more males who occupied higher management positions in U3As than females (4.3.1.6), and the survey also showed that a higher percentage of males served as tutors (4.3.1.5). This illustrates that men do play an important role in the functioning of U3As.

The study also showed that over 70 percent of the management committees' "course-coordinators", "publicity officers" and "secretaries" are females (Table 4.63). From a community contact and advertising point of view it might be helpful to have more of a gender mix in these management committee areas in order to attract members of both genders.

Apart from the advantages U3As would gain if they were able to recruit more males into their membership, there are also the advantages that men would gain from becoming U3A members. This study illustrated a significant number of benefits members believe they have experienced as a result of participation in U3A, whether intellectual, social, or health. Non-members, since they do not participate, are losing out on these benefits.

The findings of this study illustrate that only 3.6 percent of participating U3As made an attempt to provide courses targeted particularly at one gender. It appears as if few attempts have been made to create courses that are attractive to men. The extensive list of courses conducted by the participating U3As in Victoria for the year 2005 is displayed in Appendix A10, and the list demonstrates that the discipline of science was not well represented (apart from computer courses), and the same was evident in the member participants' 'wish-list' (Table 4.56).

The presidents' survey included an open-ended question asking if anything was specifically done to increase male membership, but only a few make special attempts.

The findings of this study also show that there appears to be a lack of awareness of the existence and aims of U3A in the community.

5.2 RECOMMENDATIONS FOR IMPROVEMENT OF PRACTICE

- *What recommendations can be made, based on the findings, to improve the educational provision of U3A and encourage the participation of older adults, especially men, in its programmes in Australia?*

- *What are the more important causes of the gender imbalance that is a common feature of such programmes, with special reference to the educational needs of older men?*

1. The findings illustrate that the most significant problem that U3As in Victoria have is obtaining tutors. The findings also show that educational attainment of U3A members is well above the average Australian population. In reality there should be no problem in following the 'learn and teach' motto of Laslett (1996: 228). It is, however, a considerable commitment for a retired person to accept a voluntary tutor position for weekly or bi-weekly classes for a year or longer.

   I suggest that creative strategies have to be employed to alleviate the problem of obtaining tutors:

- For U3As to arrange workshops where tutors present sessions on "the joy of being a tutor" and the peer-teaching philosophy (see enthusiastic and appreciative statements, 4.1.1.3).
- To use a "shared teaching commitment" strategy between two or several people. There are a number of subjects where that is a possibility.
- To offer courses in "how to teach". This already occurs at two U3As; they offer courses in "course development and course design" and in "teaching".

2. The study also showed the large male/female ratio problem.

- Courses specifically targeted to a particular gender might help to increase membership. One of the reasons men do not join might be that a number of the courses offered are not interesting to men. Only 2 of the 53 U3As surveyed indicated that they offered courses "specifically targeted to a specific gender" (4.3.1.8).
- The possibility of offering more "gender-specific courses" could be discussed at meetings of U3As or at the Network Victoria meetings in order to overcome the possible 'discrimination' factor.

3. The findings showed that 78.2 percent of the participating U3As advertise to attract members. However, why do U3As in Victoria only attract 1.47 percent of the over 55 population (ABS, 2004: 26–28)?

- Are advertisements not effectively designed, or are they not in the right places for their target audience to see them? Advertising should depict the variety of courses U3A provides, not only academic, but also arts and craft categories and some "male-specific courses".
- This study showed that psychological and other barriers prevented members from joining U3A at an earlier date (4.2.2.8). Focused advertising should help to overcome psychological barriers (previous poor educational experiences and "too old to learn"), and also to explain the term "university."
- The media could play a larger part in informing the public about U3A through announcements and possibly interviews with members and management committee members. The fact that U3A participation offers many benefits to members should be highlighted. The media frequently use stereotypical images to portray older people as being a burden to society; this should be challenged. It would be refreshing to see programmes depicting older adults who enjoy learning.

5.3 SUGGESTIONS FOR FURTHER RESEARCH

During the literature review it became obvious that there was a large gap in the literature on information about older adults continuing lifelong learning. While some research has been done, it is a fraction of what is available in other disciplines.

This study was designed to be exploratory in nature; the results of the surveys and the completed analysis are suggestive of future research directions:

1. A further, more in-depth investigation of the perceived "benefits of participation" that members experience in educational, social and health aspects would be valuable.

2. The shortage of tutors is a consistent theme in this study. A look at a cross-section of tutors might shed light on the backgrounds and interests that result in a willingness to tutor and an ability to tutor successfully.
3. It would be of value if a group of U3As could be encouraged to offer some "gender-specific courses" aimed at attracting male members. The advertising approach, the implementations of it, and the results of a qualitative study should supply useful information. It would be interesting to see if and to what extent the male/female ratio would change.
4. The other area closely related to the above is that participants indicated that there could be improvement in the "type of courses being offered". A more in-depth analysis could discover which subject areas members would like to see added to the course lists of U3As.
5. It would be interesting to know why the discipline of science is so poorly represented as a subject choice. Is the reason "shortage of tutors", or is it that the majority of members are not interested in science subjects? If the latter is the case, does this reflect a general disinterest in science and technology, or is this disinterest mainly from female members?
6. U3A research by U3A members. There is meagre literature relating to older adults being actively engaged in education and about the benefits, joy and fulfillment this brings to their lives. It is strange that the little research available into U3A has not been conducted by U3A members but by university faculty, by younger academics. While Swindell (1999: 243) stated that this was good as otherwise it might be seen as "a potentially exclusive activity", Lasslett (1996: 230), on the other hand, in September 1981, originally proposed that U3A members should be involved in research. That the original meaning of the word "university" is meant as a community of scholars, as explained earlier, has nothing to do with U3As conducting research. As this study has shown, the education level of U3A members is substantially above that of the Australian public (ABS, 2000); many of the participants had completed an undergraduate or graduate university degree. If the community of scholars, found at every

thriving U3A, were to take up the scholarly study of their own U3A environment, enlightenment on the subject may be possible.

5.4 POSSIBLE LIMITATIONS OF THE STUDY

There are some limitations of this investigation that preventing generalisations from being made beyond the U3A organisations under consideration. As mentioned earlier, there has not been much research in this area. While this study was supported by a wealth of literature in the wider area of older adults, little applied specifically to the educational pursuits of older adults. Even less is available dealing with participation in education for the over-55 group and on education after retirement. There is also little research available dealing with male participation and the 'feminisation' of educational programmes after retirement.

The findings of this study have provided valuable insight into the educational and other benefits older adults obtain by being members of U3A. This supports the original aim of the study to show that U3As provide an important contribution to the lifelong education of older adults. While the response rate for this study was sufficiently high – 63.5 percent for the members' questionnaire and 80.8 percent for the presidents' survey – there is always the thought that those not responding might have very different attitudes and perceptions, and this is also a limitation of the study. The honesty or truthfulness of any questionnaire responses is also a limitation to the generalisability of the results.

As far as the response rate to the questionnaires is concerned, there is one aspect that was totally unexpected: not only was the response rate good, but a considerable percentage of participants enjoyed responding to the questionnaires. There were 240 (41.8%) remarks of good wishes and appreciation of being part of the study that were added to the questionnaires by U3A participants and presidents. I also received 18 letters and four phone calls from members expressing their interest in the study and appreciation of being part of it.

The findings of this study may not be applicable to all U3As in Australia. I also recognise that there are limitations to generalising the results to the wider older adult population. The findings of this study will, however, have implications for the functioning of other U3As in Victoria.

5.5 CONCLUDING PARAGRAPH

This study explored and investigated if the University of the Third Age contributed to the lifelong education needs of a sample of older adults and evaluated the perceived benefits they obtained by their participation in U3A activities.

This study provided a snapshot picture of the educational models available for older adults worldwide. The U3A, especially the British model, was been seen as increasingly popular in a number of countries and is well established in Australia. The U3A concept appealed to the participants of this study with its emphasis on education; they appreciated the peer-teaching philosophy, community orientation, accessibility, affordability, and the wide variety of courses U3As 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 the benefits of participating in U3A activities were numerous. While males and females saw personal, mental, social, and physical improvement as the key benefits of U3A participation; the results of the study also showed marked gender differences.

The issue of gender imbalance and barriers in late life education were addressed in this study and suggestions for adaptations were discussed.

The study makes a significant contribution to the topic of lifelong education for older adults. It is hoped that the findings of this study will encourage future research into the U3A learning environment and into lifelong learning for all.

BIBLIOGRAPHY

Abraham, S. (1998). Satisfaction of participants in university-administered Elderhostel programs. *Educational Gerontology, 24*(6), 529–536.

Alheit, P., and Dausien, B. (2002). The "double face" of lifelong learning: Two analytical perspectives on a "silent revolution" [Electronic version]. *Studies in the Education of Adults, 34*(1), 3. Accessed November 2003, from EBSCO (Academic Search Premier) database.

Aldridge, F., and Lavender, P. (2000). *The impact of learning on health.* London, UK: NIACE.

Anderson, G. (1998). *Fundamentals of educational research.* London: Falmer Press.

Andrews, G., Clark, M., and Luszcz, M. (2002). Successful aging in the Australian longitudinal study of aging: Applying the MacArthur model cross-nationally. *Journal of Social Issues, 58*(4), 749–765.

Andrews, G. R. (1999). Ageing triumphantly. Paper presented: Mitchell Oration. Equal Opportunity Commission of South Australia. Government of South Australia. Accessed 20 August 2004, from http://www.eoc.sa.gov.au/public/mitchell_oration99.html

Anstey, K. J., Luszcz, M. A., and Andrews, G. (2002). Psychosocial factors, gender, and late-life mortality. *Ageing International, 27*(2), 73–89.

Antonucci, T. C., and Jackson, J. S. (1987). Social support, interpersonal efficacy, and health. In L. Carstensen and B. A. Edelstein (Eds.). *Handbook of clinical gerontology*. New York: Pergamon, 291–311.

Antonucci, T., and Akiyama, H. (1991). Social relationships and aging well [Electronic version]. *Generations, 15*(1), 39. Accessed November 2003, from EBSCO (Academic Search Premier) database.

Ardelt, M. (2000). Intellectual versus wisdom-related knowledge: The case for a different kind of learning in the later years of life. *Educational Gerontology, 26*, 771–789.

Arsenault, N., Anderson, G., and Swedburg, R. (1998). Understanding older adults in education: Decision-making and Elderhostel. *Educational Gerontology, 24*(2), 101–114.

Aspin, D., Chapman, J., Hatton, M., and Y. Sawano, (Eds.). (2001). *International handbook of lifelong learning*. Dordrecht: Kluwer Academic Publishers, Vol.1 & 2, 1-820.

Atchley, R. (1983). *Aging: Continuity and change*. Belmont, CA: Wadsworth.

Australian Bureau of Statistics. (2 September 2003). *Population projections Australia*. Accessed 29 September 2004, from http://www.abs.gov.au/ausstats

Australian Bureau of Statistics. (30 June 2004). *Population by age and sex, Australian states and territories.* (3201.0). Accessed 28 July 2005, from http://www.abs.gov.au/ausstats

Australian Bureau of Statistics. (2005). Education and training experience, Australia. (6278.0, Table 9). Accessed 8 August 2006, from http://www.abs.gov.au

Australian Colleges TAFE Australian Institutes. (2005). Australian Education Network. Accessed 3 May 2005, from http://www.australian-universities.com/colleges/

Baires, R. (1996). Elderhostel participation and its relationship to life satisfaction among the elderly. Document is part of *Gerontology manual*. R. Stone (Ed.) University of Pudget Sound. Warner Tacoma, WA. USA. Accessed 17 September 2004 (download permission obtained) from http://otpt.ups.edu/Gerontological_Resources/Gerontology_Manual/Baires.html

Baltes, P. B., Mayer, U. M., Helmchen, H., and Steinhagen-Thiessen, E. (1993). The Berlin Ageing Study (BASE): Overview and design. *Ageing and Society*, *13*, 483–516.

Baltes, P. B., Staudinger, U. M., and Lindenberger, U. (1999). Lifespan psychology: Theory and application to intellectual functioning. *Annual Review of Psychology*, *50*, 471–507.

Baoku, L. I. (2002). Paper presented at XXIst IAUTA Congress in Geneva, 2–5 October 2002. (President, China National Committee on Ageing) Newsletter No. 8, p. 9. Accessed 29 June 2003, from http://www.aiuta.asso.fr/lettre8engl.htm

Bell, J. (1991). *Doing your research project.* Milton Keynes: Open University Press.

Blau, P. M. (1986). *Exchange and power in social life.* New Brunswick: Transaction Publishers.

Bonham, L. A. (1987). Theoretical and practical differences and similarities among selected cognitive and learning styles of adults: An analysis of the literature. Doctoral dissertation. The University of Georgia, Dissertation Abstracts International.

Brady, E. M., Holt, S. R. and Welt, B. (2003). Peer teaching in lifelong learning institutes. *Journal of Educational Gerontology, 29*(10), 851–868.

Brown, T. (2001). Extending learning opportunities: Adult education and lifelong learning [Editorial]. *Education Links, 63*, 30–37.

Browning, C. J. (1995). Late-life education and learning: The role of cognitive factors. *Educational Gerontology, 21*, 401–413.

Burgess, T. (2001). *A general introduction to the design of questionnaires for survey research.* Information Systems Services: Leeds University, Business School. Accessed 28 November 2004, from Http://www.leeds.ac.uk/iss/documentation/top/top2.pdf

Carlton, S., and Soulsby, J. (1999). *Learning to grow older and bolder: A policy discussion paper on learning in later life*. London, UK: NIACE.

Charles, C. M., and Mertler, C. M. (2002). *Introduction to educational research* (3rd ed.). Boston, MA: Allyn and Bacon.

Centre for Stress Management. (1996). *Results of a survey of adjustment to retirement.* Monash University: Clayton, Melbourne.

Christiansen, C. (2000) Defining lives: occupation as identity; an essay on competence, coherence, and the creation of meaning. *American Journal of Occupational Therapy*, 53, 547-558.

City of Melbourne, Home Page, Multicultural Profiles. (5 May 2006). Accessed 28 September 2006, from http://www.melbourne.vic.au./info

Clark, F., Heller, A. F., Rafman, C., and Walker, J. (1997). Peer learning: A popular model for seniors' education. *Educational Gerontology, 23*, 751–762.

Cohen, L., Manion, L., and Morrison, K. (2000). *Research methods in education*. London: Routledge Falmer.

Cross, K. P. (1981). *Adults as learners: Increasing participation and facilitating learning*. San Francisco, CA: Jossey-Bass.

Culbertson, J. (1997). Elderhostel serves the changing educational goals of seniors. *Ageing International, 24*, 126–132.

Cusack, S. (1998). Leadership in Senior's Centres: Power and empowerment in relations between seniors and staff. *Education and Ageing, 13*(1), 49–66.

Cusack, S. (1999). Critical educational gerontology and the imperative to empower. *Education and Ageing, 14*(1), 21–37.

Cusack, S. (2000). Critical educational gerontology and the imperative to empower. In F. Glendenning (Eds.). *Teaching and learning in later life.* Aldershot: Ashgate Publishing, 61–75.

Davidson, K., and Arber, S. (2002). Older men: Their social worlds and healthy lifestyles. Accessed 20 January 2004, from http://www.menshealthforum.org.uk/newsandevents/oldermen.html

Dale, L. (2001). Learning in the Third Age. In D. Aspin, J. Chapman, et al. (Eds.). *International handbook of lifelong learning: Vol. 1*. Dordrecht: Kluwer Academic Publishers, 777–798.

Darkenwald, G., and Merriam, S. B. (1982). *Adult education: Foundations of practice.* New York, NY: Harper Row Publishers.

Davenport, J. A. (1986). Learning style and its relationship to gender and age among Elderhostel participants. *Educational Gerontolgy, 12*, 205–217.

DeGirolamo, J. (2003). Retirees: The "new kids" on the campus – Education Institute for Learning in Retirement catering to retirees' need for knowledge. *USA Today Magazine* (Society for the Advancement of Education), 1 July 2003. Accessed 15 June 2004, from http://articles.findarticles.com/p/articles/mi_m1272/is_2698_132/ai_104971307/prnt

Dench, S., and Regan, J. (1999). Learning in later life: Motivation and impact. DfEE Research Report RR 183 Department for Education and Employment. Nottingham, UK. Accessed 25 February 2004, from http://www.employment-studies.co.uk/summary/summary.php?id=rr183

Derichs-Kunstmann, K. (1995). Women learn differently: A plea for a gender-specific view in educational work with older people. Paper presented at the European Conference for Third Agers, Ulm, Germany.

De Vaus, D. A. (2002). *Surveys in social research* (5th Ed.). Australia: Allen and Unwin.

Dixon, R. A. (2000). Concepts and mechanisms of gains in cognitive aging. In D.C. Park and N. Schwarz (Eds.). *Cognitive aging: A primer,* Philadelphia: Taylor and Francis (23-41).

Eckerdt, D. J. (1986). The busy ethic: Moral continuity between work and retirement. *The Gerontologist, 26*, 239–244.

Editorial. (2002). *International Journal of Lifelong Education, 21*(3), 397–398.

Elderhostel Inc. (2004a). The history of Elderhostel. 2004 Program. Accessed 7 September 2004, from http://www.elderhostel.org/about/history.asp

Elderhostel Inc. (2004b). A brief overview of the LLI movement. Accessed 12 September 2004, from http://www.elderhostel.org/Ein/overview.asp

Fauré, E. (1972). *Learning to be: The world of education today and tomorrow.* International Commission on the Development of Education. Paris: UNESCO.

Findsen, B. (2001). Older adults and learning: Challenges for the future. Summary of Keynote Address to U3A Auckland Network Annual Conference, 29 August 2001, at Takapuna, Auckland. (Non-published Conference Events.)Centre for Lifelong Learning: Auckland University, NZ. Accessed 29 September 2004, from http://www.aut.ac.nz/faculties/arts/social_sciences/centre for_lifelong_learning/tirdage

Findsen, B. (2002). *Older adults and learning: A critique of participation and provision.* Proceedings of a Lifelong Learning Conference, Rockhampton, Qld., 16–19 June, 172–180. Accessed 28 April 2003, from www.library.cqu.edu.au/conference

Fisher, B. J., and Specht, D. K. (1999). Successful aging and creativity in later life [Electronic version]. *Journal of Aging Studies, 13*(4), 457. Accessed November 2003, from EBSCO (Academic Search Premier) database.

Formosa, M. (2000). Older adult education in a Maltese University of the Third Age: A critical perspective. *Education and Ageing, 15*(3), 315–339.

Frazier, L. D., Hooker, K., Johnson, P. M., and Kaus, C. R. (2000). Continuity and change in possible selves in later life: A 5-year longitudinal study. *Basic and Applied Social Psychology, 22*(3), 237–243.

Frazier, L. K., Johnson, P. M., Gonzalez, G. K., and Kafka, C. L. (2002). Psychosocial influences on possible selves: A comparison of three cohorts of older adults. *International Journal of Behavioural Development, 26*(4), 308–317.

Freysinger, V. J. (1995). The dialectics of leisure and development for women and men in mid-life: An interpretive study. *Journal of Leisure Research, 27*(1), 61–84.

Gaskell, T. (1999). Motivation, process and participation: The effect of context. *Education and Ageing, 14*(3), 261–275.

Glendenning, F. (2000). The education for older adults "movement": An overview. In F. Glendenning, *Teaching and Learning in Later Life*. UK: Ashgate Publishing Ltd.

Glendenning, F. (2001). Education for older adults, *International Journal of Lifelong Education, 20*(1/2), 63–70.

Glendenning, F. (Ed.). (2000). *Teaching and learning in later life: Theoretical implications*. London: Ashgate Publishing Ltd.

Gorard, S., Rees, G., and Fevre, R. (1999a). Patterns of participation in lifelong learning: Do families make a difference? *British Educational Research Journal, 25*(4), 517–532.

Gorard, S., Rees, G., and Fevre, R. (1999b). Two dimensions of time: The changing social context of lifelong learning [Electronic version]. *Studies in the Education of Adults, 31*(1), 35. Accessed November 2003, from EBSCO (Academic Search Premier) database.

Gorard, S., Rees, G., Fevre, R., and Welland, T. (2001). Lifelong learning trajectories: Some voices of those "in transit." *International Journal of Lifelong Education, 20*(3), 169–187.

Grabinski, C. J. (1998). Cohorts of the future. *New Directions for Adult and Continuing Education, 77* (Spring), 73–84.

Hall-Elston, C., and Mullins, L. C. (1999). Social relationships, emotional closeness and loneliness among older meal program participants. *Social Behavior and Personality, 27*(5), 503–518.

Hiemstra, R. (1994). Lifelong education and personal growth. In A. Monk (Ed.), *The Columbia retirement handbook.* New York: Columbia University Press, 525–548.

Hietaluoma, A. (1999). *Third age universities in Finland.* University of the Third Age, Jyvaskyla, Finland. Accessed 25 June 2006, from http://www.uni-ulm.de/LiLL/5.0/aufsaetze/AnnelieHietaluoma/fi-jyvaeskylae.html

Horstcotte, H. (2003). Education is a civil right – Die Volkshochschule Goethe-Institut. Accessed 23 October 2004, from http://www.goethe.de/kug/buw/sub/thm/en57742.htm

Hrapkova, N. (21 October 2004, Personal communication). Dr. Nadeza Hrapkova, Head for the University of the Third Age, at Comenius University, Bratislava, Slovakia. www.uniba.sk/utv

Huang, C. S. (2003). A comparative study of education for older adults in Taiwan and England with special reference to the University of the Third Age. Thesis submitted to the University of Nottingham for the Degree of Doctor of Philosophy. UK. The British Library, British Thesis Service, DX 225049.

Hurworth, R., and Harvey, G. (2001). *U3A Network Victoria Accommodation and Cluster Options (ACO) Project. Vol. 1: Profile of Universities of the Third Age (U3As) and the potential for clustering arrangements.* Report for the Adult and Community and Further Education Board (ACFEB). Melbourne: Centre for Program Evaluation, University of Melbourne.

Hurworth, R., and Rutter, A. (2001). U3A *Network Victoria Accommodation and Cluster Options (ACO) Project. Volume 2: Accommodation models for U3As: Existing and potential.* Centre for Program Evaluation, University of Melbourne.

Jackson State Community College. (2005). Senior adult discount rules and procedures. Jackson, Tennessee. p. 1–2. Accessed 29 March 2005, from http://www.jscc.edu/busofc/senior- audit.htm

Jamieson, A., Miller, A., and Stafford, J. (1998). Education in a life course perspective: Continuities and discontinuities. *Education and Ageing, 13*(3), 213–228.

Jarvis, P. (1998). Third Age Education and the global market: A future for liberal adult education. *TALIS Bulletin, 8*, 22–29.

Jarvis, P. (1989). Being, learning and aging. *Educational Gerontology, 15*, 161–170.

Jarvis, P. (2001). *Learning in later life: An introduction for educators and carers.* London: Kogan Page.

Jarvis, P. (2002). *The implications of life-wide learning for lifelong learning.* Paper to be presented at the Danish Presidency EU Conference on Lifelong Learning, 9 October 2002. Accessed 16 July 2003, from http://us.uvm.dk/lifelonglearning/pdf/peterjarvis.pdf.

Jones, S. (2000). Older people in higher education: A personal perspective. *Education and Ageing, 15*(3), 339–351.

Jones, I., and Symon, G. (2001). Lifelong learning as serious leisure: Policy, practice and potential. *Leisure Studies, 20*, 269–283.

Johnson, M. L. (1995). Lessons from the Open University: Third-age learning. *Educational Gerontology, 21*(5), 415–427.

Kerlinger, F. N. (1970). *Foundations of behavioral research*. New York, NY: Holt, Rinehart and Winston.

Kleiber, D. A. (1985). Motivational reorientation in adulthood and the resource of leisure. In D. Kleiber and M. Macht (Eds.), *Motivation and adulthood*. Greenwich, CT: JAI Press.

Knowles, M. (1990). *The adult learner: A neglected species* (4th ed.). Houston, TX: Gulf.

Kolb, D.A. (1976). *Learning Style Inventory manual*. Boston: McBer and Comp.

Kolb, D.A. (1984). *Experiential learning: Experience as the source of learning and development.* Englewood Cliff's, NJ: Prentice-Hall.

Kolland, F. (1993). Social determinants and potentials of education in later life: The case of Austria. *Educational Gerontology, 19*(6), 535–550.

Kressley, K. M., and Huebschmann, M. (2002). The 21st century campus: Gerontological perspectives. *Educational Gerontology, 28*, 835–851.

Lacey, A., and Luff, D. (2001). *Trent focus for research and development in primary health care: An introduction to qualitative analysis.* Trent Focus, 2001, 1–39. Accessed 21 June 2005, from http://www.trentfocus.org.uk/Resources/Qualitative percent20Data percent20Analysis.pdf

Lamdin, L., and Fugate, M. (1997). *Elderlearning: New frontier in an aging society*. The American Council on Education. Phoenix, AZ: Orys Press.

Langer, E. (1989). *Mindfulness.* Reading, MA: Addison-Wesley.

Laslett, P. (1989). *A fresh map of life*. London: Weidenfeld and Nicholson.

Laslett, P. (1996). *A fresh map of life*: *The emergence of the Third Age* (2nd ed.). UK: Macmillan Press.

Leigh, R.D. (1930). Reducing academic formalism. *Journal of Adult Education Education*, April 1930, 2(2), 122-127.

Lemieux, A. (1995). The university of the third age: Role of senior citizens. *Educational Gerontology, 21*(4), 337–344.

Lemieux, A., and Sauvé, G. (1999). Values of senior citizens enrolled in a university curricula versus those who are not. *Educational Gerontology, 25*, 67–88.

Lemieux, A., and Martinez, M. S. (2000). Gerontagogy beyond words: A reality. *Educational Gerontology, 26*, 475–498.

Levin, L. S., and Idler, E. I. (1981). *The hidden healthcare system*: *Mediating structures and medicine*. Cambridge, MA: Ballinger.

Lim, C. Y. (1998). Social activities in late life. *Singapore Medical Journal, 39*(10), October 1998. Accessed 1 July 2006, from http://www.sma.org.sg/smj/3910/articles/391oia3.html

Lindauer, M. S., Orwoll, L., and Kelley, M. C. (1997). Aging artists on the creativity of their old age. *Creativity Research Journal, 10*(2–3), 133–152.

Long, H. B., and Zoller-Hodges, D. (1995). Outcomes of Elderhostel participation. *Educational Gerontology, 21*(2), 113–127.

Louis, F. (1995). Le Monde des Universités du Troisième Age, *Santé Et Gérontologie*, Tome IV, 857–869.

Lysack, C. L., and Seipke, H. L. (2002). Communicating the occupational self: A qualitative study of oldest-old American women. *Scandinavian Journal of Occupational Therapy, 9*, 130–139.

MacNeil, R.D., and Teague, M.L. (1987). *Ageing and leisure: Vitality in later life.* Prentice Hall, New Jersey.

Manheimer, R. J., Snodgrass, D. D., and Moskow-McKenzie, D. (1995). *Older adult education: A guide to research, programs, and policies.* Westport, CT: Greenwood Press.

Manheimer, R. J. (2002). Older adult education in the United States: Trends and predictions. North Carolina Center for Creative Retirement, University of North Carolina: Ashville. http://www.unca.edu/ncccr/Reports/older_adult_education_in the_US.htm

Markowitz, M. (2001). 1962: Retired school teachers start the Institute for Retired Professionals, a community of peer-learners. *History of Education. Selected Moments of the 20th Century.* Daniel Schugurensky (Ed.) The Ontario Institute for Studies in Education of the University of Toronto. http://www.oise.utoronto.ca

McDonell, J. (1995). *Achievements and challenges: The Australian scene.* Paper presented at the U3A Conference: "How can we build a better U3A?" Canberra, April 1995, 3–14.

McDonell, J. (1998a). *Later life learning in Australia: The 'why' and 'how' of U3As.* Paper prepared for the 1998 Congress of the AIUTA pp. 1–12. Accessed 19 April 2003, from http://www4.gu.edu.au/ext/u3a/papers/

McDonell, J. (1998b). *Futures for Australian U3As*. Address to National U3A Conference, Sydney.

McGivney, V. (2004). *Men earn, women learn: Bridging the gender divide in education and training*. Leicester: NIACE.

Merriam, S., and Caffarella, R. (1999). *Learning in adulthood: A comprehensive guide* (2nd Ed.). San Francisco, CA: Jossey Bass.

Midwinter, E. (Ed.). (1984). *Mutual aid universities.* London: Croom Helm.

Midwinter, E. (1996). *Thriving people: The growth and the prospects of the U3A in the UK.* London: Third Age Trust.

Midwinter, E. (2003). Happy anniversary! *U3A Sources, An Educational Bulletin*. June 2003, Issue 19 (1–2). Published by Third Age Trust: Bromley, Kent. Accessed 20 October 2003, from http://www.u3a.org.uk.natoffice/news_and_publications/ sources/sources_1.htm

Minchiello, V. (1992). Meeting the educational needs of an aging population: The Australian experience. *International Review of Education*, 38, (4) 403-416.

Monash University. (2003). Students enrolment by age, 31 March 2003. (Personal communication, 20 January 2004).

Moody, H. R. (1986). Late life learning in the information society. In D. A. Peterson, J. E. Thornton, and J. E. Birren (Eds.), *Education and aging*, 122–148. Englewood Cliffs, NJ: Prentice-Hall.

Moody, H. R. (1988). *Abundance of life: Human development policies for an aging society.* New York, NY: Columbia University Press.

Moody, H. (2004). *Structure and agency in late-life-learning*. Institute for Human Values in Aging, affiliated with ILC (International Longevity Center – USA), New York City. Unpublished manuscript (permission to use and quote, obtained 11.7.04). Accessed 1 January 2005, from www.hrmoody.com/article7.pdf

Mullins, L., and Dugan, E. (1990). The influence of depression and family and friendship relations on residents' loneliness in congregate housing. *Gerontologist, 30*, 377–384.

National Centre for Education Statistics (NCES). (July 2000). *Lifelong learning NCES task force: Final report*. Prepared for U.S. Department of Education, Office of Educational Research and Improvement. Vol. 1, 1–64. Accessed 7 July 2004, from http://nces.ed.gov/pubs2000/200016.pdf

Neikrug, S. M., Ronen, M., Glanz, D., Alon, T., Kanner, S., Kaplan, A., and Kinori, C. (1995). A special case of the very old: Lifelong learners. *Educational Gerontology, 21*(4), 345–355.

NIACE. (1999). What motivates people to learn? *Briefing Sheet, 2*, January 1999, p. 2. UK: National Institute of Adult Continuing Education.

NIACE. (2000a). Editorial, "A brave new world?" *Newsletter, 10*, 1–4. July 2000. UK: NIACE.

NIACE. (2000b). News archive: March 2000 p. 1. Speech by Malcolm Wicks, Minister for Lifelong Learning. UK: NIACE. Accessed 5 March 2004, from http://www.niace.org.uk/news/Archives/Mar00.htm

NIACE. (2002). Older people and learning – Some key statistics. *Briefing Sheet, 32*, September 2002, pp. 1–12. UK: NIACE

Nitschke, E. (1998). Aufstiegswille Freizeit 1902: Erwachsenenbildung an der Volkshochschule. *General Anzeiger*, Bonn, 23.1.1998. Goethe Institut. Accessed 27 December 2004, from http://www.goethe.de/kug/pro/gaz/didak1902.html

Nordstrom, N. (2002). The Learning in Retirement Movement in North America. Elderhostel International. World U3A Papers. Accessed 20 July 2004, from http://www.worldu3a.org/worldpapers/ein.htm

Oppenheim, A. N. (1992). *Questionnaire design, interviewing and attitude measurement*. London: Pinter Publishers Ltd.

PAHO. (1998). Healthy ageing is a political imperative. *Ageing and Development, 1*, April 1998, p. 2. Washington, DC: Pan American Health Organization.

Pallant, J. (2001). *SPSS survival manual: A step-by-step guide to data analysis using SPSS for Windows (Version 10).* Australia: Allen & Unwin.

Patton, M.Q. (2002). *Qualitative research and evaluation methods* (3rd Ed.). California: Sage Publication.

Perry, C. (1998). *A structured approach to presenting theses.* Accessed 27 February 2005, from http://www.scu.edu.au/schools/cm/ar/art/cperry.html

Peterson, D. A. (1976). Educational gerontology: The state of the art. *Educational Gerontology, 1*(1), 62.

Peterson, D. A. (1980). Who are the educational gerontologists? *Educational Gerontology, 5*(1), 68.

Peterson, D. A. (1983). *Facilitating education for older learners.* San Francisco, CA: Jossey-Bass.

Peterson, D. A., and Masunaga, H. (1998). Policy for older adult education. *New Directions for Adult and Continuing Education, 77*, 55–60. Accessed 26 September 2003, from http://www.niace.org.uk/research/health/Projects/Impact.htm

Picton, C., and Lidgard, C. (1997). Developing U3A. *Third Age Learning International Studies ,7,* 219–224.

Pinquart, M., and Sörenson, S. (2001). Influences on loneliness in older adults: A meta-analysis. *Basic and Applied Social Psychology, 23*(4), 245–266.

Pinquart, M. (2002a). Creating and maintaining purpose in life in old age: A meta-analysis. *Ageing International, 27*(2), 90–114.

Pinquart, M. (2002b). Good news about the effects of bad old-age stereotypes. *Experimental Aging Research, 28*, 317–336.

Pitman, A. (2006). Get the knowledge. *The Oldie* (Magazine), March 2006: 26. UK. http://www.theoldie.co.uk/oldie/oldie_march_files.pdf

Price, W. F., and Lyon, L. B. (1982). Educational orientations of the aged: An attitudinal enquiry. *Educational Gerontology, 8*(5), 473–484.

Punch, K. F. (1998). *Introduction to social research: Quantitative and qualitative approaches.* London: Sage.

Purdie, N., and Boulton-Lewis, G. (2003). The learning needs of older adults. *Educational Gerontology, 29*, 129–149.

Query, J. L., and James, A. C. (1989). The relationship between interpersonal communication competence and social support among elderly support groups in retirement communities. *Health Communication, 1*(3), 165–184.

Radcliffe, D. (March 1982). U3A: A French model for later years. Paper presented at the annual conference of the Comparative and International Education Society, New York City. ERIC Document Reproduction Service No. ED 228 134.

Ryff, C. D. (1989). Happiness is everything, or is it? Explorations on the meaning of psychological well-being. *Journal of Personality and Social Psychology, 57*, 1069–1081.

Ryff, C. D., and Heidrich, J. M. (1997). Experience and well-being: Explorations on domains of life and how they matter. *International Journal of Behavioral Development, 20*(2), 193–206.

Ryff, C. D., and Singer, B. (1998). The role of purpose in life and personal growth in positive human health. In P. T Wong and P. S. Fry (Eds.), *The human quest for meaning*, pp. 213–235. Mahwah, NJ: Erlbaum.

San Francisco State University. (Spring 2005). Registration form. College of Extended Learning. OSHER Lifelong Learning Institute. p. 1. Accessed 29 March 2005, from www.cel.sfsu.edu/olli/-52K

Sarason, B. R., Sarason, I. G., and Pierce, G. R. (Eds.). (1990). *Social support: An interactional view*. New York, NY: John Wiley & Sons

Savukinas, R., Jackson, G., and Caiwei, X. (2002). Open universities: A revolution in lifelong learning. In W. Haddad and A. Draxler, (Eds.), *Technologies for education: Potential, parameters and prospects.* Prepared for UNESCO by Knowledge Enterprises Inc. by UNESCO and Academy for Educational Development. Pt. III, pp. 164–168 (p. 212). Accessed May 2004, from www.aed.org/publications/TechnologiesForEducation/TechEdChapters/13.pdf.

Scala, M. A. (1996). Going back to school: Participation motives and experiences of older adults in an undergraduate classroom. *Educational Gerontology, 22*, 747–773.

Schuller, T. (2002). Delivering age equality in the access and provision of education. Paper presented to the IPPR Seminar, 17 April 2002, at King's Fund. p. 15. UK: Nuffield Foundation.

Schurenski (Ed.) The Ontario Institute for Studies in Education of the University of Toronto. Accessed 13 October 2004, from http://fcis.oise.utoronto.ca/~daniel_schugurensky/assignment1/1962irp.html

Scott, A., and Wenger, G. C. (1995). Gender and social support networks in later life. In S. Arber and J. Ginnn (Eds.), *Connecting gender and ageing: A sociological approach*, pp. 158–172. Buckingham: Open University Press.

Searle, M. S., Mahon, M. J., Iso-Ahola, S. E., Solrolias, H. A., and Van Dyck, J. (1995). Enhancing a sense of independence and psychological well-being among the elderly: A field experiment. *Journal of Leisure Research, 27*(2), 107–124.

Seiffert, K. (2002). *We are becoming a "long-life society"*. UN Second World Assembly on Ageing: Longevity: Challenge and Chance. The Swiss Contribution to the Second World Assembly on Ageing. Madrid, 2002. (1), 1–66. Accessed 6 September 2004, from http://www.bsv.admin.ch/ahv/actuell/e/BCV_E.pdf.

Sheehy, G. (1995). *New passages*. New York, NY: Random House.

Shelton, J. (2001). 1971: UK Open University opens its doors. In D. Schugurensky (Ed.). *History of education: Selected moments of the 20th century* [online]. Accessed 21 October 2004, from http://fcis.oise.utoronto.ca/~daniel_schugurensky/assignment1/1971ukou.html

Siebert, D. C., Mutran, E. J., and Reitzes, D. C. (1999). Friendship and social support: The importance of role identity to aging adults. *Social Work, 44*(6), 522–533.

Simson, S., Thompson, E., and L.B. Wilson (2001). Who is teaching lifelong learners? A study of peer educators in institutes of learning in retirement. *Gerontology and Geriatrics Education*, 22, 31-43

Smith, M. C. (1998). Adult educational psychology: The interface between adult learning, development, and education. Unpublished manuscript, 1 September 1998. Northern Illinois University. Accessed 2 August 2004, from http://www.cedu.niu.edu/~smith/Unpubs/Adult_ed_psyc.doc

Snijders, J. (1995). Higher education for older people in the Netherlands. Paper presented at the European Conference for Third Agers, 1995, Ulm, Germany. Accessed 17 October 2004, from http://www.uni-ulm.de/LiLL/5.0/E/5.3/4higher.html

StatPac. (2006). Designing surveys and questionnaires – Cover letters, a public service of StatPac. Inc. Accessed 29 June 2006, from http://www.statpac.com/surveys/-13K-

Stebbins, R. (1992). *Amateurs, professionals and serious leisure.* Montreal: McGill-Queen's University Press.

Stephan, J., Leidheiser, D., and Ansello, E. (Spring 2004). Mental fitness and the lifelong learning movement. *Age in Action, 19*(2), 1–5. Virginia Geriatric Educational Center. Virginia Commonwealth University: Richmond, VA. Accessed 2 July 2004, from http://www.vcu.edu/vcoa/AGEsp04.htm

Stevens, F. (1995). Same problems and solutions: The Australian Scene. Paper presented to U3A Conference Canberra, Australia. pp. 17–20.

Strauss, V. (2000). Post retirement classes helping elderly stay sharp. *Washington Post*. Tuesday, March 21, 2000, p. A11. Accessed 29 May 2003, from http://www.washingtonpost.com/ac2/wp=dyn?pagename=article&node=&contend Id=A47 39.

Strauss, W., and Howe, N. (1987). *The fourth turning: An American prophecy*. New York, NY: Broadway Books.

Strauss, W., and Howe N. (1991). *Generations: The history of America's future 1584–2069*. New York, NY: William Morrow, Inc.

Stuart-Hamilton, I. (1998). Women's attitudes to ageing: Some factors of relevance to educational gerontology. *Education and Ageing, 13*(1), 67–87.

Swindell, R. (1991a). Educational opportunities for older persons in Australia: A rationale for further development, *Australian Journal of Education, 35*(2), 175–186.

Swindell, R. (1991b). *Universities of the Third Age in Australia: Characteristics and aspirations*. Paper presented at the Australian Association for Research in Education Annual Conference, Surfers Paradise, Australia, 26–30 November 1991. Accessed 18 July 2003, from http://www.aare.edu.au/91pap/swinr91.234

Swindell, R. (1993). U3A (University of the Third Age) in Australia: A model for successful ageing. *Ageing and Society, 13*, 245–266.

Swindell, R. (1999). U3As in Australia and New Zealand: Society's $4 million bonanza. *Comparative Education, 35*(2), 235–247.

Swindell, R., and Thompson, J. (1995). An international perspective on the University of the Third Age. *Educational Gerontology, 21*(5), 429–44.

Swindell, R. (2002). U3A online: A virtual university of the third age for isolated older people. *International Journal of Lifelong Education, 21*(3), 414–429.

Takahashi, K., Tamura, J., and Tokoro, M. (1997). Patterns of social relationships and psychological well-being among the elderly. *International Journal of Behavioral Learning, 21*(3), 417–430.

U3A Network Victoria Inc. (2004). *A brief history of Universities of the Third Age*. Accessed 31 August 2004, from http://home.vicnet.net.au/~u3app/history.htm

Third Age Trust. (2004a). *U3A Information 2004*. UK. Accessed 20 September 2003, from http://www.u3a.org.uk/natoffice/general_info/info_pack.htm

Third Age Trust. (2004b). *About the U3A.* UK. Accessed 30 July 2004, from http://www.u3a.org.uk/~natoffice/general_info/describes_u3a.htm

Toon, B. (2004). (Personal Communication, 3 September 2004). University of the Sunshine Coast, Queensland, Australia.

Truluck, J. E., and Courtenay, B. C. (1999). Learning style preferences among older adults. *Educational Gerontology, 25*, 221–236.

U3A Johannesburg. (2002). *Brochure.* Accessed 2 June 2003, from http://www.u3a.org.za/U3A_JNB/jnb percent20brochure.htm

U3A Johannesburg. (2004a). *Newsletter*, January 2004. Accessed 29 September 2004, from http://www.u3a.org.za/U3A_JNB/Newsletter percent20Jan04.doc

U3A Johannesburg. (2004b). *Course list – Issue August–September 2004.* Accessed 21 September 2004, from http://www.u3a.za/U3A_JNB/Course percent20List percent20Aug-Sept percent202004.htm

U3A Network Victoria Inc. (2004). *A brief history of Universities of the Third Age.* Accessed 31 August 2004, from http://home.vicnet.net.au/~u3app/history.htm

Universität Osnabrück. (2003). *Universität für Ältere: Gasthörerprogram. Wintersemester 2004/200*. Accessed 31 July 2003, from www.zsb.uni-osnabrueck.de/Senioren.html

Universität Ulm, Zentrum für Allgemeine Wissenschaftliche Weiterbildung. (2004). *Veranstaltungen des ZAWI , Sommersemester 2004.* Accessed 5 September 2004, from http://www.uni-ulm.de/uni/fak/zawiw/ www.zawiw.de

Universität Zürich. (2003). *Jahresbericht der Senioren-Universität Zürich.* Accessed 6 September 2004, from http://www.unizh.ch/services/seniorenuni/jahresbericht/index.html

University of the Third Age Durban. (2004). *Course list 2004.* Accessed 20 September 2004, from http://www.u3a.org.za/U3A_DBN/Course percent20list percent2030 percent20January percent202004.htm

University of the Third Age Pretoria. (2004a). *Course list 2004.* Accessed 21 September 2004, from http://www.u3a.org.za/U3A_PTA/PTA percent20Course percent20List percent20June2004.doc

University of the Third Age Pretoria. (2004b). *2004 brochure.* Accessed 21 September 2004, from http://www.u3a.org.za/U3A_PTA/Brochure1.doc

University of the Third Age, Comenius Universität, Bratislava, Slovak Republic. (2004). Accessed 29 September 2004, from http://www.uniba.sk/webuk/sucasti_uk/UTV/e_basic.htm

Universidade Sénior de Almeirim (Senior University of Almeirim), Portugal. (2004). *Actividades, 2004.* Accessed 8 January 2005, from http://usal.planetaclix.pt/ingles.html

Vaillant, G. (2002). *Aging well.* Boston, MA: Little Brown.

Vellas, P. (2003). *University of the Third Age*. AIUTA Association Internationale des Universités du Troisième Age. Accessed 19 July 2003, from http://www.worldu3a.org/worldpapers/vellas-uk.htm

Wain, K., (2001). Lifelong Learning: Small adjustment or paradigm shift? In D. Aspin, J. Chapman, M. Hatton, and Y. Sawano, (Eds.). *International Handbook of lifelong learning:* Vol.1. Dordrecht: Kluwer Academic Publishers, 183-198.

Waskel, S. (1982). Scope of education programs for older adults. In M. A. Okun (Ed.). *Programs for older adults.* pp. 25–34. San Francisco, CA: Jossey-Bass.

Williamson, A. (2000). Gender issues in older adults' participation in learning: Viewpoints and experiences of learners in the University of the Third Age (U3A). *Educational Gerontology, 26,* 49–66.

Withnall, A. (2000). The debate continues: Integrating educational gerontology and lifelong learning. In F. Glendenning (Ed.). *Teaching and learning in later life: Theoretical implications,* pp. 87–98. UK: Ashgate.

Wolff, L. (2000). Lifelong learning for the third age. *TechKnowLogia,* September/ October, *2*(5), 81–84. Accessed 27 February 2004, from http://www.techknowlogia.org

Yenerall, J. (2003). Educating an aging society: The University of the Third Age in Finland. *Educational Gerontology, 29,* 703–716.

Young, K. (1996). Re-discovering the joy of learning. *AAHE Bulletin.com.* Publication of the American Association for Higher Education. December 1996 Bulletin, 1–4. Accessed 6 March 2004, from http://aahebulletin.com/public/archive/joy percent20of percent20learning.asp?pf=1

Young, S. (1999). The learning city. Paper given on 14 May, Senior Studies Institute. University of Strathclyde, Glasgow.

Appendices

Appendix A1: **Years of Having Been a U3A Member**

YEAR BECAME A U3A MEMBER

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1980	1	.2	.2	.2
	1983	1	.2	.2	.3
	1985	3	.5	.5	.9
	1986	4	.6	.7	1.5
	1987	2	.3	.3	1.9
	1988	7	1.1	1.2	3.1
	1990	13	2.1	2.2	5.3
	1991	11	1.8	1.9	7.1
	1992	18	2.9	3.1	10.2
	1993	15	2.4	2.6	12.8
	1994	16	2.6	2.7	15.5
	1995	36	5.7	6.1	21.6
	1996	24	3.8	4.1	25.7
	1997	24	3.8	4.1	29.8
	1998	42	6.7	7.1	36.9
	1999	34	5.4	5.8	42.7
	2000	57	9.1	9.7	52.4
	2001	39	6.2	6.6	59.0
	2002	53	8.5	9.0	68.0
	2003	55	8.8	9.4	77.4
	2004	65	10.4	11.1	88.4
	2005	67	10.7	11.4	99.8
	2400	1	.2	.2	100.0
	Total	588	93.8	100.0	
Missing	System	39	6.2		
Total		627	100.0		

Appendix A2: Member Questionnaire

U3A MEMBER QUESTIONNAIRE

Please spend 10 minutes filling in this questionnaire. For each question, please indicate the response(s) that most closely resemble your personal opinions.
Please do not put your name, or make any identifying marks on this questionnaire.
No one from your organisation will see the completed questionnaire. It will be impossible to identify individual views.

Q1 Please indicate your sex:

- Male ❑
- Female ❑

Q2 Please indicate your age in years ----------

Q3 What is your current marital status? (tick one)

- Married ❑
- Single ❑
- Widowed ❑
- Divorced ❑

Q4 Please tick the highest level of education that you have achieved

- Primary School ❑
- Less than two years High School ❑
- High School ❑
- Business, Technical or Trade Certificate ❑
- Undergraduate Diploma ❑
- Undergraduate University or College Degree ❑
- Postgraduate Degree ❑

Q5 What type of work did you do before you retired?

- Management ❑
- Professional ❑
- Service Occupation ❑
- Tradesperson ❑
- Secretarial/Office Work ❑
- Farming or Forestry ❑
- Construction/Maintenance ❑
- Unskilled Labour ❑

Q6 Please indicate when you became a U3A member ----------

Q7 Have you participated in any U3A courses this year?

Yes ❑

No ❑

If you ticked "No" to Question 7, please skip to Question 8. If you ticked "Yes" please go on to answer 7a and 7B.

Q7a Please write the names of the courses you have participated in THIS YEAR.

_____

_____

_____

_____

_____

_____

Q7b How much do you feel that you have benefited from the courses that you enrolled in THIS YEAR? (Please tick one)

Very Much ❑

A Good Deal ❑

A Fair Amount ❑

Not Much ❑

Little or None ❑

Not Sure ❑

If you answered Questions 7a and 7b, please skip to Question 9.

Q8 If you did NOT participate in any U3A courses THIS YEAR, what was your main reason for not participating? (Please tick one).

No Courses of Interest ❑

Too Far to Travel ❑

Course Full/No Vacancy ❑

Course at Inconvenient Time ❑

Other (please specify in the space provided) ❑

_____

_____

Q9 If you have attended U3A courses in ANY year, please write the names of your favourite courses: (overleaf)

_____

_____

_____

_____

_____

Q10 In general, would you prefer courses to be conducted in: (Please tick one)

Traditional Classroom Settings ❑

Small Informal Groups ❑

In Private Homes ❑

It Does Not Matter ❑

Q11 Why did you join the U3A? (Please indicate your TWO most important reasons for joining*).

Curiosity ❑

To Gain Knowledge ❑

Personal Satisfaction ❑

To Mix With Stimulating People ❑

To Escape Daily Routine ❑

To Make New Friends ❑

(*Please mark the most important reason with a "1" and the next most important reason, if applicable, with a "2").

Q12 Have you enrolled during the past five years (including this year) in any TAFE or University courses?

Yes ❑

No ❑

If you answered "no" to question 12, please also answer Question 12a.
If you answered yes, please go to Question 13.

Q12a If you answered "no" to Question 12, what was your most important reason for not enrolling? (Tick one).

Transport ❑

Distance ❑

Cost of Courses ❑

Not Interested ❑

Q13 Which courses would you most like to see offered at your U3A? Please indicate anything that comes to mind, regardless of cost, tutor availability etc.

_____

_____

Q14 To what extent has participation in the U3A **increased** your:*
(Using the scale from "1" (not at all) to "5" (great extent), please indicate how much participation in the U3A has affected you in these areas by circling the number that best represents your experience. If an area does not apply to your experience, or if you are unsure, please leave it blank.

Feelings of Social Inclusion	1	2	3	4	5
	Not at all		Some Extent		Great Extent
Intellectual Development	1	2	3	4	5
	Not at all		Some Extent		Great Extent
Self Esteem	1	2	3	4	5
	Not at all		Some Extent		Great Extent
Independence	1	2	3	4	5
	Not at all		Some Extent		Great Extent
Ability to Find Employment	1	2	3	4	5
	Not at all		Some Extent		Great Extent
Memory	1	2	3	4	5
	Not at all		Some Extent		Great Extent
Health	1	2	3	4	5
	Not at all		Some Extent		Great Extent
Ability to keep up with Technological Changes	1	2	3	4	5
	Not at all		Some Extent		Great Extent

Have you experienced any other benefits as a result of participation in the U3A that are not included on this list? If so, please list them here:

Q15 Are there any areas where U3A could be improved? (If applicable, please indicate up to THREE areas, ranked in order of importance from 1-3)*.

Type of courses offered ❑
Quality of tutors ❑
Classroom availability ❑
Times and Scheduling of Courses ❑
Other (please list in the space provided)

_____

_____

(*Please mark the most important area with a "1", the next most important area, if applicable, with a "2", and the next most important area with a "3". It is not necessary to indicate three areas if this is not applicable to your experience).

Q16 What kept you from participating (joining U3A) at an earlier date/stage? (Please tick all that apply).

I was not aware of the existence of U3A ❑
I thought that I was too old to learn ❑
Negative experiences in previous educational circumstances ❑
The term "university" put me off ❑
The lecture venue/learning environment was not convenient ❑
Other (please list in the space provided)

_____

_____

Q17 Have you ever served as a tutor at a U3A?

Yes ❑
No ❑

Q18 Have you ever served on the management committee of a U3A?

Yes ❑
No ❑

Thank you very much for your time!

Appendix A3: Presidents' Survey

5/?

U3A SURVEY

I would appreciate it very much if you and / or your committee would spend a short time completing this questionnaire.

No individual U3A's will be mentioned by name. This is only a general survey. The information for each U3A will remain totally confidential. Please do not put your name on this questionnaire.

Q1 Number of U3A members who are:

Male _____

Female _____

Q2 What would you consider to be the TWO most significant problems your U3A has?*

- Classroom Space ☐
- Obtaining Tutors ☐
- Finance ☐
- Transport for Members ☐
- Obtaining Members ☐
- Not Sure ☐

(*Place a '1' in the box by the most important problem, and, if applicable, a '2' in the box with the second most important problem).

Q3 What type of premises do you use? (Tick all that apply).

- TAFE Building ☐
- University Building ☐
- Local Council Buildings ☐
- U3A Buildings ☐
- Homes of Members ☐
- Retirement Village ☐
- Other (Please specify on the lines below) ☐

_____

_____

Q4 Do you pay rent for your premises?

- Yes ☐
- No ☐

Q5 How many members on your management committee are:

Male _____

Female _____

Q6 Of the tutors that conducted classes this year, how many are:

Male _____

Female _____

Q7 For the following list of committee positions, please indicate the gender of the person holding that position. *

	Male	Female
President	☐	☐
Vice President	☐	☐
Treasurer	☐	☐
Course Coordinator	☐	☐
Publicity Officer	☐	☐
Secretary	☐	☐
Other_____	☐	☐
Other_____	☐	☐

*(If the position is unfilled, or no such position exists, please leave it blank. For 'other' please write in the name of the position in the space provided).

Q8 Do you advertise to attract members?

Yes ☐

No ☐

Q9 If your answer was 'Yes' to Question 9, what types of advertising do you do?

_____

_____

_____

Q10 Does your U3A provide courses that are specifically targeted to a particular gender? (Courses that are predominantly aimed at either women or men?)

Yes ☐

No ☐

Q11 Is there anything you do specifically to increase male membership? (If so, please list in the space provided).

_____

_____

_____

Q12 What courses has your U3A conducted this year? Please list or attach your course program for this year and return with this survey.

Q13 What, in your opinion, are the main contributions U3A makes to the life of its members? (Your long experience as a U3A member, committee member and president will have given you an insight into this question). Please list these contributions in the space below.

THANK YOU VERY MUCH FOR YOUR TIME!

Appendix A4: Letter to Box Hill U3A Members

Lydia Hebestreit Address
Telephone

4 October 2005

Dear U3A Colleague,

I am writing to seek your help with my research on the University of the Third Age. I have been a member of the U3A for over 10 years.
During the past 18 months I have become very involved in learning more about lifelong education and the role that the U3A plays in facilitating it.

I am presently conducting research as part of my Doctor of Education dissertation through the University of South Africa, Pretoria. The title of the dissertation is: "An evaluation of the role of the University of the Third Age in the provision of lifelong education."

You are being contacted because you are a member of U3A Box Hill, one of the U3A's that I am examining in this research. I would appreciate it very much indeed if you would be so kind as to complete the enclosed questionnaire. I have discussed the questionnaire and my research with Mr. Colin Mayfield, President of Box Hill U3A and members of the management committee. The questionnaire is totally anonymous, and no attempt will be made to identify individual respondents.

You are probably rather busy, as most retired people are, but it would be great if you could spend a short time to complete the questionnaire and return it to me within a week in the enclosed, addressed, stamped envelope.

Once I have completed the thesis I would be happy to share the findings with the U3A of which you are a member.
I thank you in advance for your help.

Yours sincerely,

Lydia Hebestreit

Appendix A5: Letter to Frankston U3A Members

Lydia Hebestreit

Address
Phone Number

4 October 2005

Dear U3A Colleague,

I am writing to seek your help with my research on the University of the Third Age. I have been a member of the U3A for over 10 years.
During the past 18 months I have become very involved in learning more about lifelong education and the role that the U3A plays in facilitating it.

I am presently conducting research as part of my Doctor of Education dissertation through the University of South Africa, Pretoria. The title of the dissertation is: "An evaluation of the role of the University of the Third Age in the provision of lifelong education."

You are being contacted because you are a member of Frankston U3A, one of the U3A's that I am examining in this research. I would appreciate it very much indeed if you would be so kind as to complete the enclosed questionnaire. The questionnaire is totally anonymous, and no attempt will be made to identify individual respondents.
Mr. Theo de Jong, President of Frankston U3A, Mrs. Audrey Moore, Vice President and Members of the Management Committee are aware of the research I am conducting.

You are probably rather busy, as most retired people are, but it would be great if you could spend a short time to complete the questionnaire and return it to me within a week in the enclosed, addressed, stamped envelope.

Once I have completed the thesis I would be happy to share the findings with the U3A of which you are a member.
I thank you in advance for your help.

Yours sincerely,

Lydia Hebestreit

Appendix A6: Letter to U3A Presidents

Lydia Hebestreit AO.

Address
Telephone Number

October, 2005

The President
U3A Benalla & District Inc.
C/O. The Centre,
P.O. BOX 583
BENALLA VIC 3671

Dear
I am writing to seek your help with my research on the University of the Third Age. I have been a member of the U3A for about 13 years. During the past 18 months I have become very involved in learning more about lifelong education and the role that the U3A plays in facilitating it.
I am presently conducting research as part of my Doctor of Education dissertation through the University of South Africa, Pretoria. The title of the dissertation is: "An evaluation of the role of the University of the Third Age in the provision of lifelong education."

Over the past few weeks I have distributed questionnaires to members of a few U3As in Victoria. To supplement the research questions I posed in those questionnaires I need some information about administrative and some other aspects of U3As in Victoria, which I cannot obtain from members generally, but only from Presidents or the Management Committees of U3As.
U3A Network Victoria is aware of the research I am conducting.

In my thesis I will not identify your U3A or any other U3A. I will also **NOT**- in any way- make comparisons between U3As. The information you are giving me, the number of members and other items, will only appear as total numbers for Victoria and not as individual U3A data.
I also would like to let you know that I am financially not supported by anyone. There is no grant involved. This total research is a personal project and totally at my own expense.
I would appreciate it very much indeed if you would return the completed questionnaire to me, if at all possible within a week, in the attached self- addressed and stamped envelope.
Thank you for your help, I appreciate it.

Yours sincerely,
Lydia Hebestreit

Appendix A7: List of Courses Attended in 2005

(Member questionnaire Question 7a)

Disciplines	Courses	Number of respondents who indicated they attended
Science and Technology:		
	Astronomy	3
	Nuclear Energy	2
	Computer	
	Computers for Beginners	45
	Computers Advanced	15
	Word	17
	Internet	7
	Excel	5
	Access	2
	Publisher	2
	Graphics	2
	Digital Camera (also Nunawading U3A)	4
Humanities:		
	Languages:	
	German Beginners	17
	German Intermediate	10
	German Advanced	12
	French for Beginners	30
	French Intermediate	20
	French Advanced	22
	Italian 1	36
	Italian 2	18
	Italian 3 (Conversation)	10
	Latin	10
	Latin and Classics	4
	Chinese Language & Culture	9
	Mandarin Cantonese	8
	Spanish Introduction	15
	Spanish Intermediate	5
	Spanish Advanced	4
	History	
	History (not specified)	11
	Australian History	31
	Victorian History (Australia)	19
	English Migration to Australia	2
	Early Melbourne	4
	Tudor England History	8
	Renaissance	11
	Victoria to 1900	5
	Italian History	5
	The Medici	11
	Byzantine History	3
	Renaissance Art	4
	Italian Renaissance	8

	Literature	
	Australian Literature	5
	Poetry	8
	Shakespeare's Dramas	8
	English Poetry	9
	English Short Stories	14
	Poetry for Pleasure	12
	Play Reading	4
	Short Stories (Henry Lawson, David Malouf)	4
	Writing Group and Creative Writing	29
	Classics	10
	Greek Mythology	6
Social Sciences - Politics - Business		
	Philosophy	37
	Psychology	14
	Social Psychology	6
	Politics	
	Current Affairs	35
	Australian Politics (RMIT U3A)	2
Business:		
	Investment, Stock Market	5
Music and other Arts:		
	Music (not specified)	5
	Classical Music	3
	Choir	40
	Choir (Kingston U3A)	1
	Music Appreciation	78
	Composers	4
	Jazz	5
	Chamber Orchestra (Hawthorn U3A)	1
	Music History	5
Art – Fine Art:		
	Watercolour Painting	20
	Mixed Media	3
	Drawing / Sketching	4
	Oil Painting	24
	Pastel Drawing	5
	Calligraphy	3
	Exploring Art through drawing (Hawthorn U3A)	1
Fitness:		
	Walking Group	34
	Bush Walking	26
	Tai Chi	54
	Exercise to Music	14
	Lawn Bowls	4
	Table Tennis	4
Games – In door:		
	Mah Jong	49
	Bridge	42
	Advanced Bridge	5
	Scrabble	5

	Solo	13
	Cryptic Crosswords	21
	Canasta	3
Practical Courses:		
	Handcraft	5
	Embroidery	6
	Folk Art	4
Miscellaneous:		
	Genealogy	4
	Meditation	20
	Travel discussion	
	Travel in Italy and general travel discussion	18
	Short course: Body, Mind & Soul	
	On-line U3A Courses:	
	Eastern Philosophy,	1
	Botany	1
	World Religions	1

Appendix A8: List of Favourite Courses Attended in the Past

(Member questionnaire Question 9):

Disciplines	Courses	Number of respondents who indicated they attended:
Science and Technology:		
	Mathematics	2
	Modern Science (Hawthorn U3A)	1
	Practical Electronics	2
	Architecture	1
	Melbourne Architecture	1
	Melbourne Colonial Buildings	2
	Astronomy	4
	Geography	2
	Geology	3
	Archeology	6
	Nuclear Energy	4
Computer Courses		55
	Word	5
	Advanced	18
	Excel	4
Humanistic:		
	Languages	
	Hebrew	4
	Italian 1	44
	Italian 2	12
	German	30
	German Advanced	7
	French	42
	French Advanced	6
	Latin	10
	Chinese - Mandarin	7
	Chinese Language and Culture	4
	Spanish	11
	Indonesian	2
	Affects of Latin in the Classics & Modern Languages	3
History		
	Variety of History Courses	26
	Ancient Civilizations	7
	Australian History	50
	Byzantine History	2
	European History	2
	English History	4
	Tudor England	14
	History of Italian Immigration (Victoria)	2
	Renaissance	2
	Renaissance – Italy	6
	Renaissance – Venice – Florence	3
	History of Early Melbourne	2
	Gold Rush – Australia	1

	Early Australian History	2
	History of Revolutions	7
	History of the World	1
	History of British Raj in India	2
	Military and Naval History	2
	Modern History	2
	History of Italy	6
	History of India	1
	Greek History	7
	Italian Cities	1
	Historical Dilemmas (Ireland & Middle East)	2
	History of Aborigines (Victoria)	3
	Medieval History	1
	History of the Silk Road	1
	Japanese History (Hawthorn U3A)	1
	Henry VIII Era	1
	Irish Famine	
Literature		
	Language of Poetry	1
	Reading Shakespeare	10
	Shakespeare Plays	4
	Poetry	9
	Literary Discussion Group	1
	Short Stories (Australian)	2
	English Literature	14
	Drama from Ibsen to present day	6
	English Expression	4
	Children's Literature	2
	Book discussions	5
	Linguistics	2
	Classical Studies	4
	Writing Group / Creative Writing Group	20
Social Sciences – Politics – Business:		
	Sociology	5
	Philosophy	33
	Philosophy of Science	2
	Hindu Philosophy	2
	Psychology	13
Politics		
	Current Affairs	27
Financial Studies		
	Share Investment	5
	Stock Market	3
	Financial Planning	8
Management Courses		2
Public Speaking		3
Music and Art:		
Music:		
	Music any type:	9
	Music Appreciation	51
	Opera	2
	Chamber Music	3

	Choir	26
	Jazz	2
	History of Ballet	3
Art:		
	Art Appreciation	4
	Art History	3
	Pastel Drawings	7
	Oil painting	15
	Watercolour painting	15
	Calligraphy	2
	Folk Art	5
Fitness Activities		
	Tai Chi	30
	Exercise to Music	6
	Walking Group / Bush Walking	18
	Dance and Movement	3
	Table Tennis	2
	Yoga	3
Games - In door		
	Mah Jong	26
	Scrabble	3
	Bridge	16
	Bridge Advanced	3
	Solo	4
	Cryptic Crosswords	18
Practical Courses:		
	Gardening – Bonsai	1
	Home Maintenance	1
	Furniture finishing	1
	Embroidery	4
	Photography	2
	Cameras	2
	Video Cameras	2
Miscellaneous:		
	Armchair Travel	3
	Meditation	10
	Travel in Italy	3
	Genealogy	3
	Mind, Body and Soul	2
	Bird Watching	1
	Natural History	2
	Numerology	1
	First Aid	1
	Bugs, Beetles & Butterflies	11
	Environmental Studies	2

Appendix A 9: 'Wish list' of Courses Members Would Like to See Offered

(Member questionnaire Question 13):

Disciplines	Courses	Number of respondents
Science and Technology:		
	General Science Courses	32
	Today's Science	2
	Advances in Physics	4
	Advances in Chemistry	4
	Mathematics – present day	6
	Electro Magnetic Spectrum	2
	Electronics	3
	Nuclear or alternative Power resources	1
	Present Scientific Developments	2
	Technological Advances	3
	Scientific Future	1
	Geology	2
	Geography	2
	Archeology	10
	Astronomy	6
	Architecture	2
	Metereology	2
	Botany	2
	Road Design	2
	Town Planning	2
	Environmental Affairs	2
	Computer Courses	
	Basic computer Skills	12
	Advanced	40
	Internet	6
	Editing on Computers	1
	Computer Graphics	1
	Computer Installation	1
	Computer Minor Repairs	1
	Computer – Excel and MYOB	2
	Macintosh Computers	1
	Digital Camera via Computer	2
	Humanities:	
	Languages:	
	English	2
	German	13
	German Advanced	3
	German Conversation	1
	Dutch	1
	French	13
	French Advanced	1
	French Conversation	1
	Italian	12
	Italian Advanced	1
	Italian Conversation	2
	Spanish	2
	Spanish Advanced	2

Spanish Conversation	1
Hebrew	1
Japanese	2
Japanese conversation	1
Indonesian	2
Indonesian Advanced	1
Latin for Beginners	4
Greek for Beginners	1
Maltese	1
Vietnamese for Beginners	1

History courses –

Variety of History Courses	18
American History	2
Anglo Saxon History	2
Ancient History	2
Australian History	13
History of Aborigines	2
Ancient Egypt – The Pyramids	2
English History	2
European History	10
German History	2
French History	2
Italian History	2
Roman History	1
Spanish History	1
Middle East History	3
Arab Influence in Spain	1
Indian culture and History	2
Russian History	1
History of languages	1
Early Dutch History & Culture	2
Wider range of History	1
History 16th & 17th Century	1
History of English Language	2
Military and Naval History	2
Military History	6
Aeronautical History	3
Historical Dilemmas	2
World History	2
Art History	4
History of Architecture	3
Local History	2
History of Antiques	2
Origin of Americans	1
History of Malta & Malta Culture	1
Egyptology	1
History of Science	2

Literature

English Literature	14
Play Readings	3
Drama	2
Linguistics	1
English Expression	2
Shakespeare Plays	3

Study of Chaucer	3
Australian Poetry	2
How to write a Novel	1
Writing – how to prepare a manuscript	1
How to publish written work	1
Creative Writing Group	4
Book discussions	11

Social Sciences – Politics – Business – Legal Studies

Psychology	11
Sociology	6
Anthropology	3
Philosophy	15
Philosophy of Science	2
Legal Studies	6
Ethics	2
Religion	
Religions of the World	3
Comparative Religion	1
Critical Analysis of the Bible	2
Politics	
Politics and Civics	9
Current Affairs	9
Political Science	2
Women in Politics	2
Local Government	2
Aboriginal Issues	2
Economics	
Financial Planning and Management	16
Superannuation discussions	2
Budgeting	4
Economic History	2
Financial Discussions for Retirees	2
Investment Strategy	5
Share Market	4
Macro-Economics	1

Music and other Arts

Theatre – all aspects	4
Drama Production	2
Classical Music	5
Music Appreciation	6
Reading Music	3
History of Music	2
History of Ballet	3
History of Opera	4
Opera Appreciation	3
Musical Instruments – discussions	2
Learn to play an instrument:	
Piano	2
Keyboard	3
Discussion Classical Music	1
Classical Jazz	2

Composers	3
Choir	5
Art – Fine Art	
Art and Fine Art	2
Art Appreciation	4
History of Art	4
Pastel Drawing	2
Pencil Drawing	2
Sketching	1
Creative Arts	1
Oil Painting	5
Watercolour Painting	7
Botanical Drawing	1
Calligraphy	2
Life Drawing	2
Intuitive Art	1
Photography / Film:	
Digital Cameras	6
Photography	4
Video Recording	2
Film Discussions	2
Film Appreciation	3
Fitness:	
Yoga	13
Tai Chi	5
Pilates	1
Gentle Exercises	4
Bike Riding Group	1
Alexander Technique	1
Badminton	1
Dancing	5
Scottish Country Dancing	1
Cultural Dances	2
Line Dancing	2
Golf Tuition	1
Games – In door:	
Beginners Bridge	1
Bridge	3
Physical Games	2
Chess Playing Groups at all levels	3
Practical Courses/ Craft:	
Craft Activities	5
Woodwork	4
Woodwork for Ladies	2
Wood Turning	2
Cabinet Making	1
Gardening	6
Home Repairs	1
Pruning Roses	1
Picture Framing	1
Floral Art	1
Furniture Finishing	1

French Polishing	1
Folk Art	2
Spinning & Weaving	1
Patchwork	2
Mosaics	1
Glasswork	1
Metal Work	1
Pottery	2
Interior Decorating	1
Embroidery	1
Cake Decorating	1
Sculpture	1
Upholstery	1
Sailing	1
Cooking for One.	1
Horticulture	1

Miscellaneous:	
Bird Watching	1
Armchair Travel	6
Genealogical Studies	2
Travel as a Group	2
Debating Skills	3
Public Speaking	3
Committee Techniques	2
Health subjects	6
First Aid (CPR)	2

Appendix A9: List of Courses Conducted by the 55 Respondent U3As in 2005

(Question 12, Presidents' survey)

Disciplines	Courses	Number Response by U3A
Anthropology	General / Other	1
Anthropology	Aboriginal Studies	1
Art Appreciation	Art History	1
Art Appreciation	Art Appreciation	9
Art Appreciation	The Dutch Masters	1
Art Painting	Pastels	10
Art Painting	Water Colours	16
Art Painting	Oil Painting	19
Art Painting	Acrylics & Gouache	2
Art Painting	Sketching Drawing	8
Art Painting	Charcoal	2
Art Painting	Calligraphy	5
Art Painting	Decoupage	1
Art Painting	Life Drawing	2
Art Painting	Folk Art	5
Art Sculpture	Sculpture	1
Arts Performing	Drama / Acting*	1
Arts Performing	Speech making/ Voice production	
Computers	Computer Orientation	17
Computers	Computer for Beginners	31
Computers	Windows XP	1
Computers	Word Processing intermediate	16
Computers	Word Processing advanced	10
Computers	Excel	7
Computers	Access	2
Computers	Power Point	4
Computers	Graphics	2
Computers	Internet	19
Computers	MS Publisher	8
Computers	Scanning	2
Computers	Web page design	2
Computers	Digital Photography / Editing	11
Computers	Printers	4
Craft / Handicrafts	Craft Group	12
Craft / Handicrafts	Embroidery	13
Craft / Handicrafts	Patchwork / Quilting	10
Craft / Handicrafts	Creative Craft	6
Craft / Handicrafts	Sewing	6

Craft / Handicrafts	Dressmaking	1
Craft / Handicrafts	Tatting	1
Craft / Handicrafts	Heirloom Teddies	2
Craft / Handicrafts	Beadwork	1
Craft / Handicrafts	Crochet / Tapestry/Knitting	7
Craft / Handicrafts	Cross Stitch	2
Craft / Handicrafts	Card making	4
Craft / Handicrafts	Parchment Craft	2
Craft / Handicrafts	Candle Wicking	1
Craft / Handicrafts	Silk & Pressed Flowers	1
Craft / Handicrafts	Hand Weaving on Looms	1
Craft / Handicrafts	Tapestry	1
Craft / Handicrafts	Spinning	2
Craft / Handicrafts	Raffia Hat Making	1
Craft / Handicrafts	Lead Lighting	6
Craft / Handicrafts	Wood Turning / Woodwork	4
Craft / Handicrafts	Marquetry	2
Craft / Handicrafts	Furniture / Antique Restoration	2
Craft / Handicrafts	Car Maintenance	1
Craft / Handicrafts	Pottery	2
Craft / Handicrafts	Silversmithing/ Enamelling	2
Craft / Handicrafts	Cooking	3
Craft / Handicrafts	Ceramics	2
Craft / Handicrafts	Gardening	16
Craft / Handicrafts	Bonsai	2
Craft / Handicrafts	Paper Tole	2
Craft / Handicrafts	Mosaics	1
Craft / Handicrafts	Basketry	1
Craft / Handicrafts	Floristry	2
Current Affairs	Current Affairs – General	33
Current Affairs	Politics / Political Issues	5
Current Affairs	Social Issues	3
Dancing	Line Dancing	7
Dancing	Folk Dancing	4
Dancing	Ballroom Dancing	7
Dancing	Greek	2
Dancing	Israeli	2
Dancing	Scottish Country	2
Finance/Econ.	Financial Planning	3
Finance/Econ.	Stock Market	2
Finance/Econ.	Economics	1
Finance/Econ.	Investment Skills	5
Photography/ Film	Digital Photography	8
Photography/ Film	Photography	5
Photography/ Film	Afternoon at the Movies	2
Photography/ Film	Film Group / Club	9
Photography/ Film	Documentary Videos	4
History	Australian History	15

History	Local History	9
History	History of Victoria (Australia)	5
History	History of Southern Peninsula (Victoria)	1
History	Glorious Gold – Victoria in the 1850's	1
History	Defending Australia	1
History	History of the World	2
History	Snap Shots of history	1
History	English History	4
History	1066 and all that	1
History	History of London	1
History	Kings and Queens of England	2
History	British in South Pacific	2
History	British History: 43AD - 1550 AD	2
History	Irish History	1
History	French History and Culture	1
History	Revolutionary France	2
History	Kings of France400 – 751 AD	1
History	European	4
History	Europe after Fall of the Roman Empire	1
History	Renaissance (Italian)	1
History	Medieval History	3
History	History of Rome	2
History	The Romani &The Medici	1
History	History of the Biblical Period	1
History	Crusades	1
History	German – The Weimar Republic	2
History	German History	4
History	Ancient History	5
History	American	1
History	American Civil War	1
History	History of Iraq	1
History	Russian History	2
History	Byzantine	1
History	Egyptology	1
History	Military/Naval	2
History	History of Medicine	1
History	India	2
History	History of Indonesia	1
History	Marine Exploration	1
History	China	1
History	China from 1900+	1
History	Why Civilizations crash	4
History	Asian History	1
History	The Aztecs	2
History	ALTRA, Pacific War and Cold War	1
History	Migrations	2
History	Famous – Infamous Australians	2
History	History of Computers	1
Languages	English Beginner	2
Languages	English Intermediate	2
Languages	English Conversation	5
Languages	German Beginner	14

Languages	German Intermediate	10
Languages	German Conversation	8
Languages	Dutch Beginner	1
Languages	Italian Beginner	25
Languages	Italian Intermediate	17
Languages	Italian Conversation	11
Languages	French Beginner	25
Languages	French Intermediate	13
Languages	French Conversation	15
Languages	Spanish Beginner	8
Languages	Spanish Intermediate	6
Languages	Spanish Conversation	2
Languages	Russian Beginner	1
Languages	Latin Revision	4
Languages	Latin Intermediate	1
Languages	Yiddish	1
Languages	Hebrew Beginner	3
Languages	Hebrew Intermediate	2
Languages	Hebrew Conversation	2
Languages	Ancient Greek	1
Languages	Greek	1
Languages	Esperanto	1
Languages	Japanese	2
Languages	Indonesian	1
Languages	Chinese Beginner	4
Languages	Chinese Intermediate	1
Languages	Chinese Conversation	1
Languages	Training for Tutoring English	1
Legal Studies	Crime and Punishment	2
Legal Studies	Rights and Wrongs of Law	1
Literature	Poetry	11
Literature	English Literature	12
Literature	Improving Your English	2
Literature	Literature and Language	1
Literature	Australian Literature	3
Literature	Literature Appreciation	2
Literature	Literature, but is it Literature?	1
Literature	Shakespeare	12
Literature	Drama	6
Literature	Classical Studies	2
Literature	Classical Italians	1
Literature	Judaic Literature	2
Literature	Play Reading	8
Literature	Russian Literature	1
Literature	Reading for Pleasure	2
Literature	Greek Mythology	3.
Literature	Story Telling	2
Literature	Comedy	2
Literature	Reading James Joyce’s Ulysses	1
Literature	Book Discussion Group	26

Mathematics	Basic Mathematics	1
Mathematics	Math is fun	1
Miscellaneous	Eating/Dining out Group	7
Miscellaneous	Men's Meeting Place	1
Miscellaneous	The Men's Ensemble	1
Miscellaneous	Australian Industries	1
Miscellaneous	Wine Appreciation	5
Miscellaneous	Country Wine Making	2
Miscellaneous	Court Houses in Victoria	1
Miscellaneous	Early Clothing	1
Miscellaneous	Armchair Travel	11
Miscellaneous	Collector's Corner	2
Miscellaneous	Cooking – Mediterranean / Asian	4
Miscellaneous	Thoughts and Ideas	2
Music/ Appreciation	Music Appreciation	24
Music / Appreciation	Reading Music	2
Music / Appreciation	My favourite Composer	4
Music / Appreciation	Classical Music	9
Music / Appreciation	Piano Music – Romantic Period	1
Music / Appreciation	Theory of Music	2
Music / Appreciation	Evolution and History of Musical Style	1
Music / Appreciation	Musicals	4
Music / Appreciation	Opera	7
Music / Appreciation	Jazz	6
Music / Appreciation	Chamber Music	1
Music / Appreciation	Adventures in Enjoyment of Music	5
Music / Appreciation	Music and Literature	1
Music/ Performing	Choir	18
Music/ Performing	Hand Bell Ringing	3
Music/ Performing	Melody Chimes	1
Music/ Performing	Piano / Keyboard	4
Music/ Performing	Guitar	2
Music/ Performing	Instrumental Music Group	7
Music/ Performing	Recorder	7
Psychology	Psychology	8
Philosophy	Philosophy	21
Philosophy	Philosophy and Religions of Asia	2
Philosophy	Early Greek Philosophers	2
Philosophy	Ethics	3
Philosophy	Wisdom of Ages / Search for Meaning	4
Philosophy	Buddhist and Yoga Philosophy	1

Religious Study	Christianity	2
Religious Study	Christian Church – High Middle Ages	1
Religious Study	Comparative Religion	7
Religious Study	Bible Studies	2
Religious Study	Religions Ancient and Modern	2
Religious Study	Science and Religion	1
Religious Study	Buddhism	3
Religious Study	Islam and the Muslims	1
Religious Study	Spiritual Pilgrimagé	1
Sciences	Archeology	1
Sciences	Astronomy	10
Sciences	Science is Fun	2
Sciences/Natural	Geology	8
Sciences/Natural	Botany	1
Sciences/Natural	From the “big bang”. (Space Beginnings)	1
Sciences/Natural	Science and Civilization	1
Sciences/Natural	Science and Technology	2
Sciences/Natural	Weather and our World	1
Sciences/Natural	Frontiers of Science	1
Sciences/Natural	Sustainable Development	1
Sociology	Sociology	6
Teaching	Course development/Course design	1
Teaching	Teaching	1
Teaching	School Mentoring Group	1
Writing	Creative	32
Writing	Poetry Writing	3
Writing	For Publishing	4
Writing	Writing your Family / Life Story (Memoirs)	7
Writing	Migrant Memoirs	1
Special Events:	Weekly / Monthly Talks / Forum	23
Special Events:	On the Train (Outings)	3
Special Events:	Matinee Concerts	1
Special Events:	Historical Walks around Melbourne	3
Short		
Courses/Seminars:	History of Mathematics	1
Courses/Seminars:	Arithmetic (short course)	1
Courses/Seminars:	Synchrotron Light (Short course)	1
Courses/Seminars:	Discovering Gippsland	1
Courses/Seminars:	Aboriginal Plant Use and Management	1
Courses/Seminars:	Exploring the Grampians	1
Courses/Seminars:	Exploring the Environment	1