

Submission

to

Senate Employment, Workplace Relations and Education
References Committee

Inquiry into the progress and future direction of life-long learning

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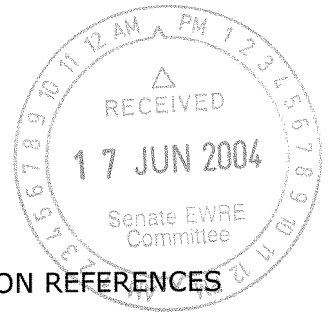
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**SUBMISSION**

to

THE SENATE EMPLOYMENT, WORKPLACE RELATIONS AND EDUCATION REFERENCES
COMMITTEE**PROGRESS AND FUTURE DIRECTION OF LIFE-LONG LEARNING INQUIRY**

from

U3A ONLINE INC

An Association Incorporated in NSW

1. Concerning the first Term of Reference

(a) *policies and strategies aimed at addressing the life-long learning needs of an ageing population.*

Recommendations:

- 1.1 *Organisations like Universities of the Third Age (U3As) should routinely be promoted in concert with campaigns like quitting smoking, sensible exercise and healthy diet as part of the mix of activities that older people can choose to follow in order to maximise their chances for ongoing independence.***
- 1.2 *Organisations like U3As should be recognised as generating, through the voluntary efforts of their members, significant savings to governments through the provision of programs which support maintenance of independence – and hence the delaying or deferral of the needs of participants to enter institutions where they require care.***
- 1.3 *In consequence, governments should espouse policies that would enable organisations like U3As to become eligible to apply, within the mainstream of adult and community education and/or of health budgets, for recurrent funding to supplement their volunteer contributions.***
- 1.4 *The criteria for Deductible Gift Recipient status should be amended to make it explicit that organisations like U3As are eligible to apply.***

2. Concerning the second Term of Reference

(b) *the ways in which technological developments, particularly the Internet, have affected the nature and delivery of life-long education.*

Recommendation

- 2.1 *The Commonwealth Government should offer recurrent funding support for programs like that of U3A Online which use the flexibility of the Internet to provide isolated older people with new opportunities to participate in life-long learning.***

3. Concerning the fourth term of reference

(d) *technological barriers to participation in life-long learning and adult and community education, and the ways and means by which these might be overcome.*

Recommendations

- 3.1 *The Commonwealth Government should continue to press for improvements, in rural and remote Australia, in the affordability of access to Internet Service Providers.***
- 3.2 *Commonwealth and State Governments should provide funding in support of free internet access in libraries and training in the use of those facilities.***
- 3.3 *State governments should make special funding provisions for the installation and operation of computer laboratories in U3As.***

4. Concerning Terms of Reference (c), (e) and (f)

U3A Online Inc has no involvement in matters relating to these Terms of Reference and hence makes no recommendations relating to them.

Discussion in support of the above Recommendations

The U3A Movement and the life-long learning needs of an ageing population

The University of the Third Age (U3A) movement has been the most prominent Australian development in addressing the life-long learning needs of older people. In U3A circles, the Third Age of a person's life is often referred to as the 'Age of Active Retirement'. An eminent writer about ageing, Peter Laslett, speaks of it as the 'Age of Personal Achievement' which for most people is only reached after the stresses of home making and working life have been left behind.¹

This voluntary self-help movement was founded in Australia in 1984, only three years after its emergence in the UK. Its primary objective is the provision of programs of learning activities which will give stimulation and development to the lives of older people. The vast majority of these programs are designed and offered by U3A members themselves; so a member will often alternate between the roles of student, tutor and administrator.

Currently there are 178 known U3As in Australia with a total membership in the vicinity of 60,000. Memberships of individual U3As range from the 20s to several thousand. Members range in their ages from 45 to 95 years and come from a wide range of backgrounds. Clearly there is diversity in the ways in which U3As operate but a useful rule of thumb is that the number of weekly activities offered by a U3A is of the order of 8% to 10% of its membership. Thus a U3A of average size – about 350 members – would usually have a weekly program of about 30 classes, all devised and presented by volunteers from among its members. A member may attend more than one such class. The average attendance is about two per week.

U3As are self-regulating in that there are no (or very few) certificated courses offered and thus they are not attractive to persons wishing to re-enter the work force. Members

¹ Laslett, Peter (1989): *A Fresh Map of Life: The emergence of the Third Age* (Weidenfeld and Nicolson)

plan their own 'pathways' which are educational pathways and not 'employment' pathways. Thus they are cost effective, efficient and unique providers of adult education for those who do not need or seek retraining but who understand the value of life-long learning.

The value of these organisations to the Australian community lies in their contribution to the health and wellbeing of older Australians. An ageing population presents a myriad of social and economic challenges – as Australian governments are becoming well aware. Prevention or deferral of the emergence of some of these problems, particularly in the area of health, is a financially sensible strategy for governments to adopt and this is a main thrust of this submission.

U3As and the maintenance of health and well-being of their members

Increasingly, research findings from all parts of the world are confirming that the intuitive hunch, that maintenance of mental activity will sustain general health and well-being, is indeed correct. A recent conference paper² summarises much of this research into 'successful ageing'. One study, for example, showed that

Many successful agers ... reported that they sustain their mental ability as they age by actively working at keeping their minds sharp. The research suggests that 'this is part of a cycle that promotes mental ability: the more you have, the more you do; the more you do, the more you preserve'.

More recently, the Director of the Howard Florey Institute, in Melbourne, Professor Frederick Mendelsohn, speaking of U3A audiences that he had addressed, wrote

*The people attending these seminars are excellent examples of how continued mental and social activity may help to maintain brain function. Indeed we now have evidence from studies of inherited neurodegenerative disease that this is true ... the old adage of 'use it or lose it' seems to be right.*³

New knowledge and the pleasures of the processes of learning are clearly important to U3A members. However, forming new social networks rates more highly. Surveys of U3A members consistently show that making new friends in new areas of common interest, and the support offered by these circles of friendship, are of even greater importance. Many have spoken of the way in which this social support has helped them get through times of crisis.

On the evidence, therefore, it is clear that U3As and other organisations engaged in similar activities are annually saving governments large sums of money by deferring or even eliminating the need for some of their members to leave independent living and enter some form of residential care⁴. ***This provides a pragmatic case for government recognition and support for the U3A movement, which is the subject of our Recommendations 1.1 and 1.2.***

Financial constraints on U3As – relevance of government policies

Membership subscriptions provide the bulk of the income of U3As. In many cases significant financial assistance is provided by other agencies – e.g. the provision of low rent or rent-free accommodation by local government or special purposes grants from bodies such as the ACFE Board in Victoria. However offering learning activities at minimal cost is central to the successes of U3As, particularly in encouraging

² Swindell, R and Dale, L: *U3A Online: enriching the lives of older members of a multicultural society*. Copy available from <http://www4.gu.edu.au/ext/u3a/papers/index.htm>

³ *the florey*: newsletter of the Howard Florey Institute

⁴ See, for example, Swindell, R: *U3As in Australia and New Zealand – society's \$4million bonanza* Comparative Education 35(2) 235-247. 1999

participation by older persons on low incomes. Many U3As struggle to keep subscription rates from rising a great deal faster than do the incomes of their members.

Two factors commonly contribute to this problem. The first is associated with growth and success. In its early days a new U3A typically operated with its office in the home of one of its founders and with its 'classroom' provided by some friendly neighboring organisation at minimal or zero cost. As it grew, it needed more spaces for both its office and its classes. Unlike many other community organisations which may have a need for a meeting room once a week or once a month, a successful U3A, like the 'average' one described above, needs several classrooms during several hours of each weekday. Such spaces are not easy to find in many communities – particularly at non-commercial rentals. So for many U3As, finding space for its classes and finding the money to rent them is a permanent, nagging problem.

A second factor leading to financial difficulty arises from the changing needs of members. In the early days classes were based on discussion sessions augmented by inexpensive teaching aids like blackboards and slide projectors. More recently though there has been an almost exponential growth in demand among older people for computer classes. At one level, many such people wish to learn basic skills such as word processing and the use of databases and spreadsheets. They are interested in writing letters, in writing short stories and articles in popular 'creative writing' courses, in writing family histories, in keeping financial accounts and so on. At another level, many want to learn to use the Internet as a medium of communicating with others (particularly, it seems, grandchildren) by email and also as a cornucopia of learning resources. U3A Online (of which more later) particularly taps into this latter interest – but participants need to learn how to use the Internet first and naturally turn to U3As for that. Many U3As have therefore had to find the resources to set up their own computer laboratories. These are always operated and maintained by volunteers from within their numbers. Even after somehow finding the capital to establish them, maintaining computer laboratories is a constant financial burden on the organisation.

Some U3As have been successful in obtaining funding from government agencies. Many in Victoria have benefited over the years from support from the ACFE Board. By and large such grants have been *ad hoc* – given for various particular purposes. And even in Victoria, not all recognised U3As are qualified to apply for such grants. Not all U3As are regularly in need of such support but none that we know of has succeeded in obtaining access to recurrent funding, as have other community-based educational services. We believe that it would make an enormous difference to the U3A movement if access to recurrent funding under appropriate conditions were available to those U3As that feel a need to apply for it. Not all will want this option but many would be grateful for it.

This would not be a great burden on governments. Even modest grants at, say, the level of \$20 per member per annum could not amount to a total of more than \$1.2 million at this stage - a trifling amount in the context of health and education budgets and an amount that is never going to increase to embarrassing proportions. ***It is these considerations that lead to our Recommendation 1.3.***

Deductible Gift Recipient status

Some U3As and related organisations would welcome modest commercial sponsorships. Presently, however, they are inhibited from seeking such support because they do not have Deductible Gift Recipient status – they are not eligible to apply for it. A small legislative change by the Commonwealth government is all that would be needed to rectify this situation – at no cost to the government. ***Hence our Recommendation 1.4***

U3A Online Inc – <http://www.u3aonline.org>

The U3A Online project is a rather special byproduct of the U3A movement. It is a world-first virtual U3A that allows older people to study U3A-type courses at home or elsewhere via the Internet. It also provides the most up to date list of Australian U3A addresses, news items and other helpful information. It is principally designed and operated in the interests of older people who are isolated by disability or because of social (eg carers) or geographical circumstances. U3A members and groups also have access to its services.

It was started in 1998 by a group of U3A enthusiasts in Australia with help from others in NZ and the UK. All those involved – the course writers and those who administer the project – are volunteers. In 2002 U3A Online entered into a joint venture with The Third Age Trust, the umbrella organisation of about 140,000 U3A members in the UK. This move has greatly enhanced the scope of the project.

The courses available vary from time to time but can include subjects such as: Autobiography and Journaling, Antarctica, Astronomy, Genealogy, Introduction to Western Philosophy and The Impact of the Romans. Access is also available to some UK courses. The project was initiated with a grant from the Commonwealth Department of Education as its contribution to the International Year of the Older Person. It has since received considerable assistance from the Departments of Health and Aged Care and, latterly, from the Department of Education again. It is now supported by Griffith University as part of its Community Service Program and freely hosted on the Griffith University server.

Feedback from enrolees in U3A Online courses is continually sought and those of us involved in it have no doubt of the benefits that it provides. A small sample of comments from participants in various courses reads thus:

- *I feel as though I belong to something to keep my mind off my pain, also to keep my brain working.*
- *I enjoy these courses. They provide the stimulation of learning as well as allow interaction with other like-minded people. Interaction on this level is limited in isolated areas and situations I have felt this communication has enriched the quality of my present life.*
- *I am partially blind with limited short sight. I am extremely grateful to U3AOL as I now have an interest at home – am happy working on my own and life has again a meaning.*
- *This is a magnificent concept, and what a blessing it will be to those who are unable to get out and about and attend courses in person.*
- *I care for my wife who has Alzheimer's. Have done so for the past eight years.*

By its very nature this is not an inexpensive operation, despite the voluntary services of those operating it. Subscription levels have deliberately been kept low in order that they should not be a barrier to those most likely to benefit from participation. Hence regular income from subscriptions falls well short of expenditure. This gap would be even greater if our volunteers were adequately reimbursed for their out-of-pocket expenses – which, at the moment, they are not.

Funding 'in-kind' by Griffith University through provision of agreed amounts of technical staff time is greatly appreciated but additional funding has always to be sought. **We believe that the social value of this project is sufficient to warrant the kind of funding that we propose in Recommendation 2.1.** A positive response to Recommendation 1.4 could also assist greatly.

Barriers to participation in rural and remote areas

Rural and remote parts of Australia still appear to us to be significantly disadvantaged in terms of Internet access. It is a financially daunting proposition for a retired person to have to use an STD call to make contact with their ISP, particularly if they need to stay on-line for an hour or so to interact satisfactorily with a U3A Online course. Such connections should be possible for the price of a local call. We are not sure as to whether it is the Commonwealth's or Telstra's responsibility to expedite this but we urge that it should be done – ***hence our Recommendation 3.1.***

Many people find it attractive to make use of computer facilities in public libraries instead of meeting the costs of installing and operating computers in their homes. Libraries provide a laudable public service in this respect but the often-limited availability of terminals is a distinct barrier to participants in lifelong learning via the Internet. The cost to libraries of increasing the provision of space and equipment for this service and also the cost of providing and Internet broadband service (highly desirable if the time needed to spent by each user at the terminal is to be minimised) must be considerable – ***hence our Recommendation 3.2.***

Maintenance of U3A computer labs: another barrier to participation

Mention has been made of the increasing demands on U3As for computer classes and the financial burden that they face in trying to meet this demand. For this reason we believe that it would be appropriate for State governments, which are more directly in the field of funding to community-based organisations, to provide a funding stream, separate from that which is the subject of our Recommendation 2.1, for the extension and maintenance of U3A computer labs. ***We urge the Inquiry to support our Recommendation 3.3***

Concluding statement

It makes social and financial sense for policy makers to develop policies that maximize opportunities for retired people to maintain their independence. Keeping the brain active, engaging with life and developing new social networks are key attributes of successful ageing and U3As contribute directly to each of these. The fundamental basis of the U3A movement is self-help. However, as pointed out in this submission many U3As depend on outside assistance in the form of in-kind or subsidised services. If implemented, the recommendations developed in this submission will not alter the self-help philosophy. Rather they will assist U3As to provide greater opportunities for the rapidly growing population of third agers to retain control over their lives.