THE HONG KONG COUNCIL OF SOCIAL SERVICE

International and Regional Networking

**REPORT ON
ELDERLY PARTICIPATION: STUDY VISIT ON UNIVERSITY OF THE THIRD AGE IN AUSTRALIA**

(DECEMBER 1 - 5, 2003; BRISBANE AND MELBOURNE, AUSTRALIA)

Prepared & Endorsed

By

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On

February 10, 2004

1.   INTRODUCTION

Enhancing elders' participation in the society has long been a vision in our current elderly service philosophy. Providing elder learning programs is regarded as one of the numerous means to strengthen their participation.

Provision of elder learning can take several forms. Of them, probably the best known is the University of the Third Age (U3A), which has emerged as an international adult education success story for elder learners. The earliest U3A was originated in France in 1973 and this model refers to the use of "university" as a base to organize leisure or learning activities for retired people. Since then, the U3A concept has been spreading rapidly in most European countries. In 1981, the U3A idea was modified with strong mutual aid spirit in the UK. In this approach, U3A is a self-help and self-governing body with members' active participation as course leaders, students, course coordinators and office administrators, etc. Australia and New Zealand followed the British self-help model in the mid-1980s. With the initiative and support from the central government, mainland China has developed a unique model of learning for the third agers, the Universities for the Aged, since 1983.

Hong Kong has been developing learning programs for the elders since 1984. Over the years, this has become a service trend with recognition from both the NGO and government sectors. However, how to take heed from where we are so as to better plan, coordinate, network, promote and improve the existing programs and structure need further insights. Thus a study visit was organized with the following objectives:

1.1.   Objectives of the Visit

1.1.1. To learn about the U3A model in Australia
1.1.2. To gain insight on establishing and promoting U3A & elder learning in Hong Kong
1.1.3. To gain insight on setting up a U3A network in Hong Kong
1.1.4. To gain insight on how to enhance elderly participation through learning programs

1.2.   Participants

A total of 15 delegates from different service sectors participated in the study visit. Five of the delegates from the NGO sector were partially sponsored by the Hong Kong Council of Social Service. Three were from the Elderly Commission and one from the Social Welfare Department sponsored by the government. The rest were self-financed individuals from numerous organizations. Details of the delegates are listed in Appendix I.

1.3.   Themes of Observation

The study visit aimed to explore 4 major areas, namely: U3As' structure and management, U3A network in Australia, government policy on senior education, as well as the role of educational institutes in senior education. In order to ensure a systematic and fruitful learning process, delegates decided to make observations and documentations on the following themes:

1.3.1. Policy Framework including Governance, Administration and Finance
1.3.2. Curriculum Design and Quality Assurance
1.3.3. Networking and Promotion
1.3.4. Human Capital

All delegates except Ms. SO Ka-man were assigned the responsibilities for reporting and writing their individual observations, to be amalgamated into one comprehensive document.

1.4. <u>**Visit Programs**</u>

The delegates visited two major cities in Australia: Brisbane and Melbourne which are in the states of Queensland and Victoria respectively. In the two cities, there have been well-developed U3A programs with Melbourne being the originator of the U3A movement in Australia. Delegates received warm hospitality from all hosting organizations. A brief description of each visit is appended in the table below:

Dates	U3A / Organization	Speakers	Position
1/12	*U3A Brisbane* **(Annex 1)** - Established in 1986, it is located in a commercial building with many classrooms - After a brief introduction of its background & structure, delegates were free to visit the classes such as Spanish, computer, & crossword-puzzle	Mr. Rod Burton	President
	Faculty of Education, Griffth University (Mt. Gravatt Campus), Brisbane - Meeting with Vice Chancellor of the University. Delegates were briefed on how a formal tertiary education institute could participate in elderly education program. The auditing program allows older individuals to sit in classes with no credit and course obligations.	Prof. Marilyn McMeniman	Vice Chancellor
	Curriculum Teaching & Learning, Griffth University **(Annex 2)** - A lecture on the development of Australian U3As was presented	Dr. Rick Swindell	Senior Lecturer
	School of Education, University of Auckland, New Zealand **(Annex 3)** - Professor Findsen visited Dr. Swindell during our study period. He gave us a lecture at Griffth University on his research findings in "International Perspectives on Older Adult Education".	Prof. Brian Findsen	Associate Professor
2/12	*National Seniors Productive Ageing Centre, University of Sunshine Coast, Queensland* **(Annex 4)** - A lecture on "Successful Ageing" was presented	Prof. Leon Earle	Director

Dates	U3A / Organization	Speakers	Position
	University of Sunshine Coast (**Annex 5**) - Tour of the campus was arranged - This is a university with strong and widespread community participation. It offers free space for the operation of Sunshine Coast U3A to serve the local community. The library is opened for the public including the senior citizens as well as members of the U3A.	Prof. Paul Thomas	Vice Chancellor
	U3A Sunshine Coast - It is operating within the University of Sunshine Coast campus with nominal rent and free utilities to the U3A - Presentations of the programs of the U3A were made by numerous tutors and committee members to the delegates - U3A SC International Conference 2004 - Overview of USC Art Gallery - Astronomy & Language Classes - Practical Organization of Classes - Introduce U3A to Computer World - Art, Drawing, Craft - Armchair Travel, Social Dining, Activities - Newsletter	Ms. Margaret Donaldson - Ms. Valwyn Mattews - Ralph Hislop - Ernie Bennet - Dianne Delcau - Judith Keill - Christine Bancroft - Jim Irwin - Gretchen Sheffield	Publicity Officer Tutors/ members
3/12	*U3A Network, Victoria Inc., Melbourne* (**Annex 6**) - It is a central reference body for coordinating & supporting all the U3As in the State of Victoria - Its management structure and roles in coordinating other U3As in Victoria were introduced. - It plays a major role in promoting and assisting the establishment of a new U3A in a local area in Victoria	Ms. Jean Melzer	President

Dates	U3A / Organization	Speakers	Position
	Odyssey Travel, Melbourne **(Annex 7)** - A non-profit-making travel agency which makes use of the fair amount of income to sponsor researches on field trips and expeditions - Tour guides who are usually retired professionals volunteered themselves to lead the field trip	Ms. Jackie Stanley	Manager
4/12	*Manningham U3A, Melbourne* **(Annex 8)** - A U3A with huge numbers of members and courses. The local government approved a plan to build a community centre which would accommodate the U3A in future - Delegates were invited to enjoy the displays of students' works and to participate in classes	Ms. Bridget Halge	Vice President
	Nunawading U3A Computer Laboratory, Melbourne **(Annex 9)** - The laboratory is located in a shopping mall - Its operation was briefed	Mrs. Elsie Mutton	President
5/12	*Chinese Christian U3A, Melbourne* - It is located in a church and its members are mainly church members - It has no affiliation with any local U3A Network - Members have to pay for each course and the fee is comparatively higher than other U3As	Rev. Keat-Seng Teoh	The Church Pastor
	Chinese Community Social Services Centre Inc. - Visit to a Day Centre located in a community hall - Meeting with its Board members was arranged	Ms. Kim Chu	Chief Executive Officer

2. U3A IN AUSTRALIA

2.1. Origin of the University of the Third Age (U3A)

University here refers to a loose term with no connotation of academic requirements or examination. University is used in the medieval sense: when scholars or people interested in learning, they gathered in set places to join with people of like-interests for discussion and better understanding.

Third age refers to a phase of life when individuals are no longer tied to the responsibilities of regular employment and / or raising a family. It does not link to a chronological concept of age but refers to an age of active retirement, coming after the age of youth and the age of work and home making.

University of the Third Age refers to learning activities or programs organized for the people in the third age. The first U3As in Melbourne and Brisbane were respectively established in 1984 and 1986 based on the self-help approach of the British Model.

2.2. Philosophy of U3A

Positive Health Related Benefits
Physiologically, learning involves active use of cells that in turn can stimulate new cell growth and prevent cell death. Continual learning is empirically found to be effective in curing pains and bringing enjoyment of life, self-confidence and coping abilities that finally enhances the sense of well-being.

Productive Ageing
Based on the principles of "do-it-yourself", U3A encourages continual use of the enormous pool of skills and knowledge of the seniors who do not become socially marginalized but develop a sense of social contribution and ongoing anticipation. Instead of social drain, U3A can finally lead to successful ageing.

2.3. U3A Network-Victoria Inc.

In light of a large population of retired and middle-class population in the wealthy State of Victoria, a statewide network, i.e., U3A Network-Victoria Inc. was established in 1988 in Melbourne. This Network aims at fostering the creation of new U3As, supporting member U3As and widely promoting U3A for enabling elders to keep physically and mentally active and alert. As a result, U3A is booming and currently, there are 65 U3As in the Network.

2.4. Policy Framework : Governance, Administration and Finance of U3A

2.4.1. *Governance*
Most, if not all, of the U3As including the U3A Network-Victoria Inc. are *incorporated organizations* independently governed by a democratically-elected Management Committee from the members in Annual General Meeting. The Management Committee usually comprises President, Vice-President, Secretary and Treasurer who all work *on voluntary basis* with no pay at all. Members of the Management Committee are members of the U3A mostly coming from various professional fields. For example, members of the Management Committee of the Brisbane U3A are retired educator, banker, accountant, travel agent and construction company manager. They are mainly responsible for policy making, program planning, decision making and development of constitutions or sets of rules to govern the operation of U3A. Various sub-committees with at least one member from the Management Committee will be formed in order to carry out various activities. These sub-committees include administration, finance, communication, publications and coordination.

Intervention on governance from the three levels of government is totally absent in all U3As which are *fiercely autonomous*. For the U3As associated with universities or colleges, such as the Sunshine Coast U3A, they are also self-governing with university

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input being largely of a facilitative nature. For example, members can enjoy free use of the library resources.

2.4.2. *Administration*

Administration work generally covers recruitment of members, identifying tutors, coordination of classes, setting timetables and finding venues for classes, enrolment of students, keeping attendance records, publicity and publication of U3A programs. Just like the governance, all the administrative works are carried out by U3A members who work *on voluntary basis* without pay and perform their delineated duties systematically.

2.4.3. *Finance*

Most of the U3As are financially independent from the three levels of government for the highest degree of self-reliance and governance. As U3A is operated on volunteer basis with no paid staff, its running cost can be kept to the minimum. Venue for classes is usually of low rent and for some rented venue from the government, the monthly rent is only charged at a token amount of A$1 per month. There is no course fee other than a minimal amount needed to cover the material costs. For example, the computer course for six weeks in U3A Sunshine Coast is $20 that is charged for purchasing computer accessories or minor repairing work. Major income of U3A largely comes from annual membership fee ranging from A$20 to A$40, higher fee for U3A on-line subscriber. Associate members of U3A on-line subscriber only pay A$10 as annual membership fee but they do not have access to the teachers.

2.5. Curriculum Design and Quality Assurance

2.5.1. *Curriculum*

Key characteristics of the curriculum are as follows:
- Broad and diversified: classes including languages, book writing, calligraphy, philosophy, computer, fine dining, political affairs, arts and craftwork are organized;
- Negotiable & accessible: content, time, length, duration & venue are all open for discussion and negotiation on accessibility basis to the members;
- Pleasure-seeking: no entry requirements, qualifications or formal assessments as pleasure, joy and fun are the ultimate goals;
- Flexible learning format: conventional face-to-face learning, on-line teaching, discussion, interactive exercises with audio-visual aids, etc.;
- Initiated by members, tutors or course coordinators under the advice of management committee

2.5.2. *Quality Assurance*

To align with the philosophy and values of U3As and ensure pleasure for keeping members in active participation for successful ageing, quality assurance is mainly conducted by an autonomous mechanism - "vote by feet", i.e. attendance rate rather than conventional evaluation, assessment or examination which tend to induce pressure to stakeholders and undermine the creativity and learning motives of the people in the third age.

2.6. Networking and Promotion

2.6.1. *Targets*

2.6.1.1. Elderly Organizers:

- Developers of U3As responsible for organizing, administering and managing the respective U3A
- Volunteer leaders being the helmsmen of an U3A whose talents and skills need to be nurtured and zeal maintained

2.6.1.2.Elderly Participants
- Volunteer tutors of U3A who need to be encouraged to take up the tutoring and convening roles in helping the learning programs successful
- Students of U3A whose interests need to be motivated and sustained

2.6.1.3.Government Bodies
- All the 3 tiers of Federal, State and local government bodies need to be lobbied to give support to individual U3As in all aspects
- Assisting with the publicity of U3A among all relevant government departments
- Giving administrative support for providing convenient and low rent premises and venues for U3A
- Giving funding support in form of special grants for capital renovation and purchase of special equipments such as computers and software

2.6.1.4.Formal Education Institutes
- Colleges and universities are excellent sources of teachers and venues for quality teaching
- Tertiary institutes are requested to allow auditing of some classes for interested members who wish to participate in non-formal learning opportunities at the tertiary level
- Tertiary institutes are requested to make their libraries available for U3A members

2.6.1.5.Local Organizations
- Service agencies, churches and other religious groups as well as other organizations are networked to assist in the promotion of U3As among their members
- They are also invited to give donations in cash or in kind such as furniture and equipment, etc. or to establish U3As themselves

2.6.1.6.Commercial Sectors
- Including travel and pharmacy companies for supporting or sponsoring newsletters or advertisement of U3A programs etc.
- A source for funding and manpower support but Australian U3As make little effort in this respect owing to the lack of strategic perspective of networking or poor response from this sector

2.6.1.7.Politicians
- Some U3As such as the Nunnawadding U3A approach politicians for lobbying or requesting donations but emphasize neutral political stand at the same time. Usually, their donations are given in terms of attendance of or for social functions

2.6.2. Means

2.6.2.1. National Spirit of Volunteerism
There is a strong volunteering spirit throughout Australia promoting the concept that being a volunteer is regarded as a respectful role of a common citizen. This coincides with the voluntary concept and practice of the U3A movement and thus promotion of the service is directly benefited from the national promotion of volunteerism.

2.6.2.2.Political Lobbying

U3A depends on the support of government and political bodies who are networked for helping the publicity and promotion of U3As. On the other hand, strong political awareness in Australia allows U3A organizers to use their grey power to obtain the needed support for service development.

2.6.2.3. Personal Connection and Persuasion

Each organizer or member of U3A is a source of networking himself/herself, forming larger network in the local community by joining together. Personal connection is used for mobilizing members' friends, neighbours, colleagues, relatives, religious partners, etc. to participate and assist in the programs. In most of the U3A management committees, the composition includes various retired professionals such as bankers, managers, teachers and accountants and tries to absorb new blood from more professionals. They possess rich personal connection and provide valuable resources for networking.

2.6.2.4. Mass Media

Advertisements are publicized in city and local newspapers to announce establishment, curriculum or programs of U3A. U3A organizers often call up phone-in programs on radio broadcast whenever appropriate for publicity and promotion. Newsletters and pamphlets are published periodically and forwarded to relevant concerned parties for introducing their programs, recruiting members or tutors and inviting donations. Similar publicity work is also put at websites for promotion of U3A activities.

2.7. **Human Capital**

Above all, members are the most important capital of the U3As and this human capital is the key factor to the success of the Australian U3A mode of learning. These human capitals manifest in the following modes and are not mutually exclusive of each other:
- Members as students
- Members as teachers
- Members as committee members
- Members as volunteers
- Members as network coordinators

3. **INSIGHTS & RECOMMENDATIONS**

From the Australian experience, it can be concluded that the U3A mode of learning has the following characteristics that promote elders' participation in the society:
1. it promotes self-motivation and self-actualization,
2. it encourages individuals to learn for fun,
3. it fosters a sense of autonomy thus giving the locus of control to the elders themselves, to be free from external and authority interference, and
4. it enhances volunteering spirit to share and to serve one another for betterment of quality of life in the third age.

In Hong Kong, it is apparent that elders who are consumers of current welfare services provided by NGOs are of a comparatively lower education level and much work is still needed to elevate them to a higher level of functioning resembling that of the U3A spirit. In respect of the needs of this cohort of elders, current forms of learning programs should be continually supported for enabling them to live their lives to the fullest with dignity. On the other hand, there is an increasing number of better-educated professionals retired

from work whose accumulated knowledge and skills can be an ideal source of human capital for future service development. For this cohort of elders, the self-help U3A model should be promoted *to realize their sense of autonomy, self-reliance, independence as well as volunteerism which all gear to "**active and healthy ageing**"*. Based on this mission, we propose local elder learning in self-help U3A model can be developed in the following aspects:

Themes	Recommendations
3.1. Policy Framework: Governance, Administration & Finance	1. Government should set up a working group to involve concerned parties to oversee and foster the policy formulation and development of U3As. 2. Government should take an active role in promoting lifelong learning needs of the elder population to the general public, government departments, as well as the private and education sectors. 3. The Health, Welfare & Food Bureau is recommended to be the policy coordinating branch for taking an active role in facilitating the establishment of various forms of learning programs for the elders, including the U3A model, non-formal classroom learning, study courses in formal education institutes and through distance learning, on-site and radio broadcasting learning, etc. Proper name and need for U3A registration is a subject remarked here for careful consideration in future by the responsible branch in order to safeguard the interests of U3A members against any exploitation. 4. Government can render support in provision of venue for learning purpose as well as capital funding for access to education facilities, renovation of venue and purchase of equipment such as computer hardware and software, yet abstaining from intervening the daily operation of these learning units.
3.2. Curriculum Design & Quality Control	5. Similar autonomy and quality control mechanism as in Australian U3As should be allowed for the organizers and participants to initiate, innovate, design and implement their curriculum according to their needs. 6. Efforts should be made for NGOs and government to cater for the learning needs of the handicapped and home-bound elders, as well as those living in remote areas through radio and television broadcasting and on-line learning.
3.3. Networking & Promotion	7. To establish a network for linking up NGOs, institutes and organizations interested in all forms of elder learning programs. The network will serve as a coordinating body linking up all discerned operators to provide them with a platform for sharing information, experiences and resources with each other as well as with international counterparts. It will also act as a reference and advisory body to assist the establishment of new learning units in local areas. The Hong Kong Council of Social Service is planning to set up a Network relevant to existing elder learning and its information as well as current forms of elder learning programs is attached in Appendix II. 8. To set up a central data bank for elder learning to pool all concerned information and resources together such as volunteer tutors. 9. To network different sectors other than NGOs to assist in elder learning :

	- Collaborate with the private sector through HKCSS's Caring Company Project - Liaise with professional organizations to involve their retired members as volunteer tutors and organizers - Lobby the education sector and tertiary institutes to participate in provision of affordable courses for interested elders - Connect with mass media for program promotion and improvement in broadcasting effects
3.4. **Human Capitals**	10. To foster development of self-help groups organized by elders themselves and to support their roles and functions in rendering elder learning programs. 11. To recruit more better-educated and retired professionals to give due training to them as volunteer students-tutors-organizers-advocates of local U3As.

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Remark :

This report is prepared by all delegates except Miss SO Ka-man of the Social Welfare Department who will submit an independent report to her Department.

List of Participants in the Study Visit:

No.	Names	Organization	Position
1.	Ms. LEE Pui-ling, Alice	Caritas – Hong Kong	Head (Services for the Elderly)
2. **	Ms. YUEN Suk –yee, Janice	Christian Family Service Centre	Social Work Supervisor
3.	Ms. YUEN Yuk-king, Caroline	Au Shue Hung Health Centre, Hong Kong Baptist Hospital	Executive Secretary
4.	Mr. PONG Wai-ip	Hong Kong Christian Service	General Manager (Education & Training Core Business)
5.	Ms. TSANG Fook-yee, Connie	The Hong Kong Society for the Aged	Deputy Executive Director
6.	Ms. TAN Hiu-man, Lada	Md. Wong Chan Sook Ying Memorial Care & Attention Home for the Aged	Social Worker
7.	Mr. SHUM Wai-chuen	Hong Kong Sheng Kung Hui Welfare Council	District Director (Hong Kong Island)
8.	Ms. CHAN Ying-yee	Hong Kong Tuberculosis, Chest & Heart Diseases Association	Assistant Executive Secretary
9.	Ms. MA Hok-ka	Asia-Pacific Institute of Ageing Studies, Lingnan University	M Phil Student / Part –time Project Officer
10.	Ms. LEUNG Yee-man, Angela	Li Ka Shing Institute of Professional & Continuing Education, The Open University of Hong Kong	Lecturer
11.	Ms. YUEN Chui-ha	Radio Television Hong Kong	Programme Officer, (Radio 5)
12.	Prof. CHAN Cheung-ming, Alfred	Elderly Commission, HKSAR	Member
13. *	Mr. WONG Hong-yuen, Peter	Elderly Commission, HKSAR	Member
14.	Ms. WONG Yiu-ming, Anita	Elderly Commission, HKSAR	Member
15.	Ms. SO Ka-man	Social Welfare Department	SWO(P/C)(TP/N)

*   *Delegation Leader*
** *Deputy Delegation Leader*

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2.1 (Classroom Learning)

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2.2 (Radio College for Elderly)

1000 AM

2.3 (University of the Third Age – U3A)
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2.4　　　　　　*(Formal Education)*

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