

Research

University of the Third Age in Australia and New Zealand: Capitalising on the cognitive resources of older volunteers

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Aim: *To quantify and ascribe a dollar value to University of the Third Age (U3A) volunteerism in Australia and New Zealand (NZ).*

Methods: *Retired researchers and U3A leaders from both countries cooperated via the Internet to devise and manage a comprehensive survey of U3A activities in 2008.*

Results: *In total, 164 of 265 independent U3As in Australasia provided detailed counts of all activities carried out by their volunteers. In 2008, Australian U3As were supported by 871 000 volunteer hours and NZ U3As were supported by 69 000 volunteer hours. A notional value of \$20 per volunteer hour is rationalised. It values U3A volunteerism at \$21 million for Australia and \$1.9 million for NZ.*

Conclusion: *Expert retirees who are engaged in meaningful voluntary activities in their U3As provide valuable in-kind contributions to the well-being of members and to the national economy.*

Key words: *lifelong learning, peer education, successful ageing, U3A, volunteerism.*

Introduction

Society is changing rapidly and individuals are experiencing ever more complicated lives. Purely for functional reasons, older people need to continue to learn new things in order to cope with technological and social changes that affect their daily lives. However, direct health benefits may also be associated with later life learning. The Foresight Project on Mental Capital and Wellbeing involving 450 experts and stakeholders from 16 countries recommends that 'as people move into older age, learning should be encouraged and actively promoted, as this can protect against cognitive decline' (p.1058) [1].

For more than four decades and in many countries, self-help learning organisations for older people, like the University of the Third Age (U3A), have capitalised on the cognitive resources of retired volunteers [2]. Experts of all kinds retire and these expert volunteers regularly provide members of their organisations with a wide array of cognitively and physically stimulating activities within socially invigorating environments. Keeping physically and mentally active, doing interesting things and maintaining social networks are cornerstones of the Successful Ageing model [3] and many contemporary ageing policy papers make explicit reference to the importance of these attributes within their planning or action statements [4–6].

Volunteering is an important activity in the lives of many people of all ages. For example, in 2006 in Australia, 34% of the Australian population aged 18 years and over participated in voluntary work [7]. It seems that everyone can be a winner from volunteerism: participants, recipients of the services and the wider economy alike. For the volunteers themselves, those who regularly engage in their voluntary activities enjoy better health and live longer thanks to the stimulating environments and sense of purpose engendered by the activities. Zedlewski and Butrica [8] summarised the outcomes of 10 studies published since 1999 that documented the significant positive associations between activities carried out by older volunteers and decreased mortality and depression, improved health and strength, greater happiness, and enhanced cognitive ability.

Additional to these personal and wider social benefits, the diverse range of activities carried out by volunteers contributes substantially to a nation's economy [9,10]. Specifically, many older people who are no longer in the paid workforce participate in a wide range of formal and informal volunteer activities and thereby continue to contribute indirectly to the national economy [11]. Despite this, the ageing society debate often has an unduly negative, problem-oriented focus, which prompted de Vaus, Gray and Stanton to quantify the contributions made by Australian volunteers aged 65 years and older. They calculated that older volunteers' contributions to the Australian economy were worth nearly \$39 billion [12].

The upcoming generation of baby boomer retirees may be poised to continue the volunteering trend shown by previous generations. The Monash Baby Boomer Study [13] found that 'in retirement over three-quarters [of baby boomers] plan to volunteer' (p.10). However, voluntarism of older

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people cannot be taken for granted. Studies caution that organisations that have come to depend heavily on volunteers need to be sensitive to generational and attitudinal changes of upcoming cohorts of retirees. For example, organisations must reject ageist attitudes, work collaboratively with older people and provide training and skills development in order to meet the evolving expectations of their volunteers [11,14,15].

This paper reports on volunteerism within U3As in Australia and New Zealand (NZ), calculates the annual total of all allied activities and ascribes a dollar value to the self-help model. The findings are part of a comprehensive study that revealed many other details about the U3A movement in Australasia, which are not discussed here. The 70-page report, including the rationale, method, wider findings and questionnaire, is available online [16].

Method

In 2008 a group of eight retired researchers and U3A administrators from Australia and NZ set up a wiki to collaboratively devise and manage a survey of U3As in Australia and NZ that would:

- Quantify the nature and extent of U3A volunteerism.
- Describe characteristics of the U3A movement in Australia and NZ in 2008.
- Provide baseline data against which future developments in both countries can be compared.

A detailed 15-page questionnaire covering these three objectives was mailed to all 205 U3As in Australia and 60 in NZ. The questionnaire was designed for management committee response; no attempt was made to survey individual members. Two reminder emails were sent before the closing date for returns. This paper reports on the method and findings that relate to the first objective only.

Volunteer hours audit

U3As were prompted to fill in a number of tables which requested them to count details of the number of times specific voluntary activities were run, the number of volunteers involved in each activity and the duration of each activity. To illustrate the detail required from every aspect of the audit of volunteerism, Table 1 shows a pro forma for an imaginary U3A which operates for 10 weeks a year and offers five courses each week, each of 2-hour duration; 10, 5 and 2 have been entered into the respective cells of the last column by the imaginary U3A participant.

Table 1: Annual teaching hours for an imaginary U3A group

1. Duration of teaching year	10 weeks
2. Average number of courses per week	5 courses
3. Average hours of teaching per course	2 hours

U3A, University of the Third Age.

During analysis, the equivalent three numbers from each responding U3A were multiplied to provide their total teaching hours for 2008 (in Table 1, 100 hours). The individual U3A total teaching hours totals were then summed to arrive at a total for each country. An estimated 2 hours of preparation for every hour of face-to-face teaching was added during analysis to account for the considerable preparation time. (Some U3A tutors report spending five or more hours preparing for each hour of actual teaching.)

U3As also depend on volunteer expertise for their organisational cohesion. U3As provide opportunities for members to engage in meaningful voluntary activities such as participation in social committees, newsletter/publications committees, office staffing committees and so forth. Each participating U3A was asked to identify every category of administrative volunteer and to provide details of volunteers' weekly contributions by filling in a series of pro formas similar to those used to report the teaching hours. Volunteer administration hours for each category were calculated for each participating U3A and summed to arrive at an administration total for each country.

The teaching and administrative totals were then extrapolated to the total U3A membership of each country and an amount of \$20 per hour was used to value the expertise of U3A volunteers.

Results

Table 2 summarises basic membership and response data.

Response rates were good, particularly in light of the detailed and lengthy nature of the questionnaire which took U3As several hours to complete; 62% of Australian U3As and 63% of NZ U3As responded.

Teaching hours audit

Table 3 summarises aggregate teaching data from participating U3As in both countries.

Administration hours audit

Table 4 summarises aggregate administrative data for participating U3As in both countries.

Total U3A volunteer hours were obtained for each country by adding the respective grand totals for teaching and administration. Totals are summarised in Figure 1.

Table 2: Membership data and response rates

	Australia	New Zealand
1. Number of U3As surveyed	205	60
2. Total U3A membership 2008	64 160	10 154
3. Number of U3As responding	127 (62%)	37 (63%)
4. Membership of responding U3As	52 458 (82%)	7 426 (73%)

U3A, University of the Third Age.

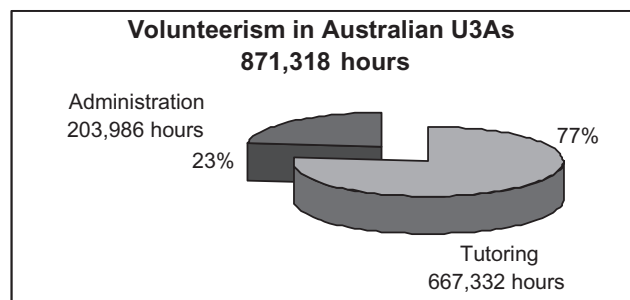
Table 3: Teaching hours by U3A member tutors in Australian and New Zealand (NZ) U3As

	Australia (hours)	NZ (hours)
1. Regular course teaching hours for 2008	215 125	17 398
2. Occasional course teaching hours for 2008	7 319	696
3. Total teaching hours for 2008 (row 1 + row 2)	222 444	18 094
4. Total preparation hours (row 3 multiplied by 2)	444 888	36 188
5. Total volunteer tutor hours (row 3 plus row 4)	667 332	54 282

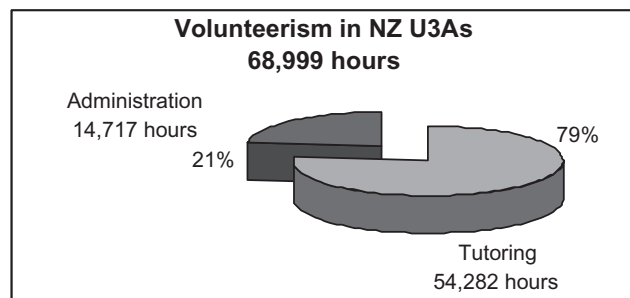
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Figure 1: Total University of the Third Age (U3A) volunteerism in Australia (a) and New Zealand (NZ) (b) in 2008.

(a)



(b)



The monetary value of University of the Third Age volunteerism

Table 5 summarises the steps taken to calculate a dollar value to volunteerism within U3As in Australia and NZ.

Calculations in Table 5 were undertaken as follows.

- Step 1: Total volunteer hours as shown in Charts 1A and 1B.
- Step 2: Total membership of all U3A groups represented in the survey as shown row 4 Table 2.
- Step 3: Hours of volunteer work per member of the responding U3As calculated by dividing Step 1 hours by Step 2 members. For example, every U3A member of the Australian responding groups was supported by more than 16.6 hours of voluntary expertise in 2008.
- Step 4: 2008 total U3A population for each country as shown row 2 Table 2.
- Step 5: Total voluntary hours extrapolated to the total membership of each country, obtained by multiplying Step 3 hours per member by the total U3A population.
- Step 6: Dollar value of U3A volunteerism obtained by multiplying Step 5 by a notional value of \$20 per hour.

Discussion

The calculated values of \$21 million dollars for Australian U3A expertise and \$1.9 million for NZ U3A expertise in 2008 are noteworthy findings, but how good are the data used to calculate these dollar amounts? The teaching data, which comprise nearly 80% of the calculated total volunteer hours for each country, are likely to be quite robust. Each U3A must advertise its courses to members. Therefore, survey participants needed merely to consult past newsletters or website listings, count the number of courses on offer and their duration throughout 2008, and write those numbers in the pro formas provided. The teaching hours data would have been some of the easiest pieces of

Table 4: Administration hours by U3A volunteers in Australian and New Zealand (NZ) U3As

	Number of U3As	Australia (hours)	Number of U3As	NZ (hours)
1. Management committee	122	26 507	35	3 593
2. Social committee	27	1 569	3	192
3. Newsletter committee	27	1 829	8	240
4. Other committees	49	6 640	5	40
5. Staffing office	53	77 006	2	354
6. Other admin tasks	108	90 435	27	10 298
7. Total administration hours		203 986		14 717

U3A, University of the Third Age.

Table 5: The monetary value of voluntary activity in Australian and New Zealand (NZ) U3As

	Australia	NZ
1. Total volunteer hours obtained from survey	871 318	68 999
2. Membership of responding U3As (obtained from the U3A Online database)	52 458	7 426
3. Volunteer hours per member represented in survey (row 1 divided by row 2)	16.6	9.3
4. 2008 total country membership (obtained from the U3A Online database)	64 160	10 154
5. Volunteer hours extrapolated to total 2008 U3A membership (row 3 multiplied by row 4)	1 065 056	94 432
6. Dollar value of U3A volunteerism at \$20 per hour	\$21 000 000	\$1 900 000

U3A, University of the Third Age.

information to obtain in the 15 page questionnaire, which covered the three objectives outlined in the *Method* section above and which took several hours to complete. It is reasonable to assume that participants would have been diligent in providing the teaching data otherwise they would have been unlikely to have participated in the study in the first place.

The administrative hours data are not as clear cut because administration activities are not a matter of public record. Nevertheless, management committees would have had a reasonably good record from their diaries of how many times various committees met throughout 2008, how many volunteers were involved with each meeting and how long each meeting normally ran. Diligent survey participants would have consulted diaries or contacted the convenors of various committees rather than merely guessing their responses to the pro forma prompts for each category of administrative activity.

In summary, if the pro formas were diligently completed, the data for the teaching hours survey can be argued to be an accurate record of the main volunteer teaching activities carried out by U3As in 2008. The administrative activities total is certainly softer, but because it was obtained by counting every administrative activity, it provides a reasonable picture of U3A administrative volunteering in 2008.

Is it reasonable to extrapolate the survey data from a 60% participation rate to the entire U3A membership population? We believe so. Although the membership at large was not surveyed, row 4 of Table 2 shows that 82% of the Australian membership and 73% of the NZ membership belonged to the responding U3A groups. These membership numbers were not estimates. Instead, they were obtained from the publicly accessible 'Locate a U3A' register available from U3A Online (<http://www.u3aonline.org.au>). 'Locate a U3A' is the only systematic register of U3As in both countries and it is regularly updated by individual committees of management. The high membership representation within U3As participating in the survey makes it unlikely that the overall volunteerism picture would have been markedly changed by the activities of the relatively small percentage of members from the non-participating U3As. For these reasons, extrapolation to the total U3A population is justifiable.

The figure of \$20 per hour for U3A expertise was arrived at by comparing hourly rates for two different strata of the paid workforce. In 2008, the minimum hourly wage in Queensland was \$13.80. This means that no adult workers could legally be paid less than that amount regardless of how poorly educated or inexperienced they were. Elsewhere we have shown that more than 90% of U3A presidents, and a very high percentage of vice presidents, secretaries and treasurers, came from professional and business backgrounds in their paid working lives [16]. These are the

administrators who provide the organisational glue and the vision to keep U3As moving with the times. Given the high level of expertise within the U3A administration volunteer base, a figure of \$20, or about 50% more than the minimum hourly wage rate, is justified. The other comparison was for a teacher in a non-government Queensland school with zero years of experience. The 2008 casual pay rate was about \$35 per hour for a beginning teacher. Corresponding wages will differ somewhat in other States/Territories and NZ. However, the principle is clear. Compared, for example, with the cost of employing casual teachers to deliver equivalent services to those freely provided by expert U3A teachers, a notional figure of \$20 per hour is both reasonable and conservative.

The question remains – what is the point of ascribing a dollar value to U3A expertise?

There is no magic pot of gold to address the problems faced by any sector of society as costs increase. Resource allocation difficulties will multiply as population ageing, climate change and other major societal imperatives place increasing pressure on governments to maximise benefits to wider society from relatively declining budgets. For the growing population of retirees, policies aimed at maximising their third age of independence and minimising time spent in the fourth age of dependency hold the greatest promise for the most advantageous allocation of resources. Strengthening social networks, regular participation in mental and physical activity and doing interesting things are widely accepted strategies associated with the Successful Ageing model [3]. These are, of course, the activities that are common to many U3As. For this reason, U3As could reasonably be described as successful ageing organisations.

Although it seems self-evident that leisure groups for seniors (not only U3As) are making an important contribution to society, the onus in the future may be placed on all leisure groups to argue the case for whatever support they need in order to continue to adequately provide for their members in an increasingly difficult fiscal environment. In the case of U3A, the strong swing by society towards cost recovery and user pays over the past few years has resulted in local councils, church groups and other early supporters of U3A activities in the community now charging for facilities that they formerly provided freely to U3As. Many U3As now report difficulty in finding reasonably priced and reasonably situated premises from which to carry out their various successful ageing activities [16]. In the future, it may well be the case that some U3As will need assistance from government in order to obtain premises that are close to public transport and are not constantly under rent review or demolition threat from commercial interests.

The above findings, when placed in the context of literature reporting on the benefits of volunteering, and the health benefits associated with later life learning, demonstrate the

importance of the U3A model to wider society. All services are provided by highly skilled retirees with little or no formal support provided by funding agencies. The peer education model which underpins U3A is a both socially and financially sensible way of harnessing the mental wealth embodied in the rapidly growing ageing population. However, the U3A concept generally remains poorly understood in the wider community. A 2008 value of \$21 million dollars for Australian U3A expertise and \$1.9 million dollars for NZ U3A expertise undoubtedly is an attention grabber. The dollar amount, coupled with data from other parts of the study, provide clear evidence of the breadth, extent and value of U3A services in both financial and social terms [16]. This information needs to be widely publicised to policy-makers at the local, regional and national level by U3A leaders and where possible, through the media.

At the local U3A level, the findings will be helpful to management committees who can now readily calculate a monetary value for volunteerism within their own U3A. All they need do is multiply their group membership by either 16.6 (for any Australian U3A) or 9.3 (for any NZ U3A) to obtain a reasonable estimate of their annual hours of volunteerism. Multiplying that yearly hours figure by \$20 per hour produces a dollar amount that could, for example, underpin grant applications to purchase computers, data projectors, hearing loops and other resources to help U3As to better meet the learning and social needs of their members.

Conclusion

For more than 20 years, with little or no systematic support from government or funding agencies, U3As in Australia and NZ have quietly provided many, very-low-cost opportunities for members to take part in most or all of the successful ageing activities that are associated with continued independence in later life. There are now more than 270 U3As in Australasia and the number of independent groups and total membership continues to increase. Successive ageing cohorts are better educated than earlier cohorts and it seems reasonable to speculate that future retirees will continue to be attracted to meaningful activities involving the latter part of the lifelong learning continuum, because of the many benefits associated with keeping the mind active and mixing with lively, like-minded colleagues. Few organisations for retirees can point to a similar range of mentally, physically and socially stimulating courses, and the wide variety of volunteering opportunities provided by most U3As. *The Foresight Project on Mental Capital and Wellbeing* [1] argues that countries must learn how to capitalise on their citizens' cognitive resources if they are to prosper. The low-cost, self-help U3A approach could well be a model for how future policy-makers might focus greater attention on capitalising on the cognitive resources of the rapidly growing numbers of expert retirees.

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Key Points

- In 2008, peer educators in more than 270 independent U3A groups in Australia and NZ provided members with a wide range of courses, resources and other services that conform to the Successful Ageing model.
- A detailed audit of every volunteer activity underpinning the self-help U3A model showed that in 2008 U3As in Australia and New Zealand were supported by 871,000 and 69,000 volunteer hours, respectively.
- A rationalised, notional value of \$20 per volunteer hour values U3A volunteerism in Australia at \$21 million, and U3A volunteerism in NZ at \$1.9 million, for 2008.
- U3As receive no core funding and many report difficulty in securing reasonably priced and situated premises in which to carry out their successful ageing activities. This study will help inform policy-makers of how effectively the self-help U3A model harnesses the cognitive resources of expert retirees to provide a wide range of activities that benefit volunteers and members and contribute to the greater good.

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