

LEARNING NOT LONELY

LIVING LIFE • EXPANDING HORIZONS • CHALLENGING CONVENTIONS



U 3 A



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Introduction

The Third Age Trust works with over 1,000 member learning co-operative charities and organisations in the United Kingdom. They are called the Universities of the Third Age (U3As). The Trust commissioned research in 2018 to assess the impact of this lifelong learning movement.

Background

The University of the Third Age movement began in 1982. The three founders, Peter Laslett, Eric Midwinter and Michael Young developed a lifelong learning concept based on skill sharing, mutuality and inclusion. Having explored the Université du Troisième Age in France, the founders wanted to stretch the concept so that it was learner led rather than being dependent on having a university lead or host.

The founders developed guiding principles (see Appendix A) for the development of U3As which have provided resilience for the movement since its inception and enabled its significant growth, becoming a movement of 420,000 older people in 2018.

The Third Age Trust

Founded in 1983, the Third Age Trust works with U3As in the United Kingdom; it is a support, development and advisory agency for member U3As.

To achieve this, the Third Age Trust centres its work on key aims, which are:

- to facilitate the growth of the U3A movement;
- to provide support for management and learning in U3As;
- to raise the profile of the U3A movement;
- to promote the benefits of learning in later life through self-help learning.

The U3A Organisations

The U3As vary in size from 30 people to 3000 people, with an average size of 400 members. They comprise learning groups (sometimes known as interest groups) which are chosen, led and developed by participants. There are over 30,000 interest groups in the United Kingdom, covering a diverse range of topic areas, from art appreciation, to Japanese to zoology. The charities are self-funding, with each participant contributing a yearly amount averaging between £15 and £30. U3A interest groups meet in members' homes, local halls and community facilities such as places of worship.

The learning model

The learning model is based on peer-to-peer learning. Members learn subjects together. They choose the subject areas, the content and the pace. Each person contributes to the learning process, and each contribution is equal in value and relevance. Any member in a U3A can start an interest group.

The funding model

The U3As are all self-funding. It is relatively unusual in the voluntary sector in the United Kingdom to have a movement of over 420,000 members that is mobilised through self-funding. This has enabled it to remain resilient and to continue to grow during times of reduced external funding streams in the sector. Its relative low cost makes it accessible to people of all income levels.

Ageing in the United Kingdom

In 2016, the population of the United Kingdom was 65.6 million, with 18 per cent of the

population being 65 and over (ONS, 2017). Of those aged 65 and over, 10.4 per cent were still in employment in 2016, the majority of whom were in part time employment (ONS, 2016). In this age bracket, there were more men working than women (ONS, 2016). Of those working over the age of 70, over half were self-employed (ONS, 2016).

There are 3.7 million people over the age of 65 who live on their own, and there are significantly more women than men living alone (ONS, 2016). There are currently 1.2 million people over the age of 65 without adult children (Ageing Without Children, 2005) and by 2030 this is expected to increase to 2 million people (IPPR, 2014).

Approximately 10 per cent of the population feel lonely all or most of the time (Victor, 2011). This can have a significant impact on their quality of life. Over 41 per cent of people over the age of 65 say they feel out of touch with modern life, and 12 per cent feel cut off altogether (Davidson, 2015). Loneliness is reported to be the equivalent of smoking 15 cigarettes a day (Holt-Lunstad, 2015), and people experiencing acute loneliness are twice as likely to develop Alzheimer's disease (Wilson 2007).

Depression affects approximately one in five older people, and is both the most common and the most reversible mental illness in later life (Mueller, 2015). Social interventions and exercise are effective alternatives to drugs in treating depression (Mueller, 2015). Those over the age of 55 spend the most time watching television, at just over four hours per day.

Research rationale

Informal lifelong learning has been defined as "learning that involves individual or collective study to improve knowledge of a subject, not involving taught classes or qualifications

[...] Generally the impulse for informal learning comes from the individual or group of individuals" (UNESCO, 2016).

The volunteer-led U3A movement, using a model of informal lifelong learning, has had a net increase in membership of approximately 20,000 people in full or partial retirement each year for the last five years. This growth is mainly through word of mouth and, anecdotally, members report that participation has a positive impact on wellbeing. The model is low cost, self-funded, flexible and learner-led, and operates in over 1,000 communities throughout the United Kingdom.

The challenges facing wellbeing in later life are well-documented and policymakers have become concerned by the impact of isolation and loneliness on people as they age, particularly through the lens of health and social care. This is further exacerbated by increased demands on statutory resources and the requirement to balance the needs of different generations.

There has been no recent evaluation of the benefits of the model of lifelong learning offered by the U3A. The anecdotal evidence suggested that the U3A model has a successful offer to communities throughout the United Kingdom. The movement operates from the perspective of positive contribution, rather than a deficit approach.

Approach

The Third Age Trust undertook a literature review to identify the impact of lifelong learning and, in particular, the impact of informal lifelong learning on participants. The findings were tested in a questionnaire completed by 801 participants, and then probed for qualitative findings in a series of eight focus groups of up to ten people across the United Kingdom.



Literature Review Findings

The literature review focused on the impact of lifelong learning on confidence, mental health, building friendships and communities and learning skills.

The concept of lifelong learning remains ambiguous in the United Kingdom and has often been discussed in the context of skills that will contribute to an effective economy. Studies relating to the pursuit of learning for its own sake have been more recent. The ambiguity of the concept of lifelong learning has made measuring impact problematic. Figures on participation in informal and non-formal learning are hard to find.

From studies available, people's engagement in learning in later life was closely connected to their level of education and perception of learning (McNair, 2015). In addition, positive and negative experiences of education in younger life affected participation in later years. (Kolland, 2013). Numbers of those learning between the ages of 50-69 were lowest among people with no qualifications and highest amongst those with higher education qualifications (Jenkins and Mostafa, 2015).

The evidence for the benefit of lifelong learning has largely been based on large-scale longitudinal and cross-sectional survey data.

Evidence from previous academic studies has largely focused on formal learning or learning across the lifespan. A number of benefits were attributed to learning. A study which focused specifically on older people found the following positive impacts of learning activity:

- improved self-confidence and independence;
- increased contribution to society;
- better engagement with society;

- better management of life transitions;
- increased digital usage and competence;
- better management of caring responsibilities;
- better wellbeing;
- intergenerational sharing of knowledge (NIACE, 2015).

A study focusing on the U3A movement indicated that people joined the U3A not just for learning but also for the social elements of friendship and support (Formosa, 2014).

Several academic reports have shown that people engaged in learning experience increased confidence and self-esteem. However, a level of confidence is needed to actually become involved in learning activity in the first place, as demonstrated by a study involving 60 U3A members (Patterson et al, 2016).

Evidence commissioned by NICE (the National Institute for Health and Care Excellence) concluded that participation in creative and physical activities could improve mental health and wellbeing. Although the study focused on taught rather than informal learning, the impact of this type of activity generally is beneficial.

The impact of social disengagement is a potential factor in cognitive decline (Kolland, 2013), whilst connecting to people by keeping learning and volunteering contributes positively to wellbeing (McNair, 2011).

In conclusion, the main body of research has focused on formal adult education, or provider learning, rather than peer-to-peer informal learning. Academic research, however, has indicated that people who engage in learning activities experience positive outcomes, especially in wellbeing.

Research Questionnaire Findings

The questionnaire tested the benefits identified in the literature review of lifelong learning. A total of 801 U3A members responded to the questionnaire. They were located throughout the United Kingdom. Respondents to the questionnaire were asked for positive impacts on the key beneficial areas highlighted by the literature review. They could respond to all relevant categories. The questions are included in Appendix B.

The table below details the numbers and percentages of respondents (out of a total of 801) who felt they had received a positive impact from participation in U3A activity.

Make new friendships and feel supported	91%	723
Learn new skills	84%	674
Feel healthier	55%	439
Become engaged with your community	50%	397
Manage life changes, retirement, illness or bereavement	50%	399
Build confidence	59%	473

All categories in the questionnaire sample had a demonstrable impact on the participants.

“U3A helps to bring people together and embark on a learning adventure with like-minded people”

“Make new friendships and feeling sup-

ported” and “Learn new skills” both had a significant positive impact on those answering the questionnaire. This demonstrates the importance of the social support offered by the U3A learning model. The social-learning balance was strongly evident when the opportunity for further comments was offered. The importance of undertaking an enjoyable activity whilst at the same time contributing to and benefiting from a support system was valued by respondents.

Questionnaire respondents also collectively demonstrated the value of the U3A model to their own wellbeing. It provides members with:

- a constructive use of time;
- a sense of purpose;
- confidence;
- feeling that they still have something to offer;
- feeling that life skills and life experience are not wasted;
- feeling valued.

There was a general perception that it made life worth living.

Vastly improved confidence and being valued through participation in learning were continuing themes.

Preventing loneliness as a result of a bereavement or moving to a new area was highlighted in individual commentary. A common driver to move in later life was to be closer to family members, but this also often resulted in losing regular contact with friends from their previous area of residence.

There was a good understanding of social responsibility and the impact of the U3A as a benefit to local communities generally. The collective impact of membership resulted in a perceived strong connection to a community in a geographical area.

There was also a theme highlighting very specific health benefits. For example, the impacts on people recovering from serious illness (such as cancer or depression) were improved feelings of wellbeing, support and confidence, because they had been encouraged to share their skills.

Supporting new U3A members was identified as being important, and examples of supportive activity included welcoming events and buddying systems to ensure they were encouraged and supported into the organisation.

The opportunity of reengaging with previous interests was important to respondents. The impact of time to pursue old interests following a period of work was seen as life-enhancing and as a new opportunity to spend time for themselves.

“Our U3A founder says that every time she goes into the local supermarket, she is accosted by older people who tell her how much the U3A has changed their lives for the better, giving them a place to feel comfortable to come on their own and the confidence to try new things without any fear of being judged”



Qualitative Focus Group Findings

The focus groups were held in Northern Ireland, Scotland, Wales, the South East, London, the West Midlands, the North East and the North West. The focus groups comprised a mix of men and women and included a range of terms of membership. Some had been members for one or two years, whilst others for over 20 years. The responses in all groups were consistent in themes and approach throughout the United Kingdom. The questions can be found in Appendix C.

Why join the U3A?

The motivation for joining a U3A related to changing circumstances, encouragement from friends or family, the desire to explore or extend existing or new interests, or the wish to offer something meaningful in retirement.

Changing circumstances

The research revealed the importance of the U3A to those who found themselves facing unanticipated circumstances in their lives.

Retirement, whilst for many is a liberating experience, for others can be quite daunting. Leaving a community of co-workers and work friends can be disorientating. The loss of the working day's structure can be a challenge, particularly for those who have had little time or support to plan for retirement. Retirement was described by group participants as a "great empty space" and "a bereavement".

Participants reflected on the need to replicate a framework outside of work. A concern of "not sitting on the settee all day", and a need to find more purposeful and rewarding activity were reported.

As most U3A activities take place during the

day and on weekdays, participants reflected that it provided a good replacement for the previous work time.

"I didn't have to get up and there were no bells and duties. I took my dog for walks, redecorated, cleaned, more walks, shopping, and then looked objectively at what was I was doing... I missed the daily exchanges, a good chat, a bit of a laugh"

For others, joining the U3A was a planned positive step in retirement offering the opportunity to meet new people who were different from those in the workplace. Participants described the positive impact of meeting people from a range of backgrounds and experiences.

The impact of a bereavement was regularly cited as a reason for joining a U3A. Losing a partner or a family member, and so wanting to make friends and find new interests, was a motivation for becoming involved. This was of particular importance if it followed a long period of informal care and support. One participant described it as a "lifeline". Divorce, like bereavement, was also a driver to finding new friends and interests.

"Four years ago I moved to a new area and decided to join a few groups to get to know people, the U3A offered the most and now takes up most of my time"

Moving to a new area can be challenging, particularly in later life. Some participants who were building their retirement in a new location described joining the U3A as a good way to meet new people.



Encouragement from family and friends

Many people had joined the U3A as a result of word-of-mouth. Family members and friends had positive experiences of joining a U3A which encouraged participants to explore the offer. This word-of-mouth reason for joining was a strong and recurrent theme. For some participants it was a natural stepping stone from work into retirement, as a result of hearing and seeing the positive impact of membership. Others talked about joining "by accident" through hearing about it from acquaintances.

"My friends kept asking me, so I joined it and haven't looked back. It filled my life"

Extending existing interests or learning something new

The opportunity to continue learning was important. For some who had an interest or

background in education or learning, continuation of learning in retirement was seen as natural progression. Learning was a lifestyle. Others, however, spoke of the opportunity to learn something new, having never previously had the time while working.

The low cost U3A model enabled participants to try or test different areas of learning without significant financial expenditure.

Meaningful offer in retirement

The opportunity to continue using skills from a previous working life were important to some participants. They were motivated to assist in the organisation of the U3As, by participating in local U3A committee, for example, or using their skills to assist with the website. People described feeling they had "something to give" and being able to "contribute again". One person however, felt they had gained skills in the U3A which they wished they had been able to cultivate in their working life.

The focus groups explored the themes evident from the literature review and the responses to the questionnaires. The answers in all groups were virtually identical in response and theme.

"It provides opportunities to use skills acquired earlier in life in ways that are useful, and that does wonders for one's self-esteem"

New skills

The beneficial impact of learning new skills was evident. The U3A philosophy of learner-led, peer-to-peer learning meant that participants enjoyed learning. They felt comfortable in the learning environment and confident to try new areas of study. Participants described the importance of being able to direct the learning experience and take responsibility for its success.

The opportunity afforded by retirement to take time to enjoy learning and, especially, learning for its own sake was valued. The stimulation of learning together enabled participants to look at the subject areas from different perspectives. It was described as becoming "immersed in learning".

The importance of learning with people from different backgrounds was raised consistently as a benefit of the learning experience. This was equalled by the value of feeling able to attend on their own and feel part of a group.

A theme of being intellectually stretched by learning opportunities was evident, with a participant describing it as offering the "possibility of exploring one's own untapped potential".

There was appreciation for the diversity of

opportunity, with the enormous range of subject areas available. There was also a great enthusiasm for being able to "try something new", or something they had never done before, such as learn a musical instrument. The ability to start something and change it if you wanted to try something else was valued. Participants also welcomed the opportunity to suggest a new group if one did not exist. One participant talked about having started a technology group, researching a technology problem and then passing the research onto others to support their engagement in this area.

"I always liked photography but it was difficult while working. Now I can learn photography with like-minded people. Whether a beginner or very competent, you can learn together"

The skills learned through simply spending time with different people were also described. These included being "able to really listen" to other adults, working collectively with people on a committee, and being diplomatic – especially knowing that all members are volunteers. The skill of enabling people on committees to interact with each other successfully was also described.

The theme of sharing research and skills was raised. This also included the value of



seeing others grow as a result of learning new skills. The opportunity to share other aspects of life while learning was also seen as important and taking the holistic approach to being part of a group was valued. Other benefits included spending time with people who had a passion for learning.

The perceptions of people older than others was also challenged and changed as a result of participation. Age became irrelevant.

"I have developed a much higher opinion of people older than me... It's changed my perception"

Health

Participant's perceptions were that there were clear health benefits from being involved in the U3A. These were divided into physical and mental wellbeing.

Involvement was described as having a focus, and a purpose for the day which ensured mental wellbeing. Mental stimulation and interest was a common theme. The research and preparation for leading sessions at interest groups was described as keeping the brain active. Participants took the role of leading groups seriously in terms of being well prepared on a topic area, and that in turn was seen as beneficial. Learning subjects such as languages and music were described as being beneficial to memory.

The opportunity to face new challenges with others and to challenge themselves was perceived as having a positive effect on health and wellbeing. Learning together, sharing experiences and, through this, feeling connected to others, was beneficial and improved quality of life. This was of particular importance to peo-

ple who lived on their own. One participant described feeling a loss of identity following retirement, and then being helped to find a new identity as a U3A member who was valued for her contribution. One carer who supported a partner and a parent described participation as having the opportunity to keep her brain alive.

The role of Chair and being part of a committee was seen as both a positive and negative experience. At times focus group members thought that chairs and other senior roles on local charity committees felt some pressure. Others felt that this pressure existed when there was little delegation undertaken. The other view was that being on a committee was a great experience as it allowed the use of skills from a previous working life. One respondent said that he got paid in "thank-yous" and that was good for his wellbeing.

"Being part of the group makes me happy... learning and interacting with others gives me a lot of satisfaction"

Friendships and feeling connected

The importance and emphasis on friendship reflected the findings from the questionnaire. For most participants, friendship and feeling connected to others was a much-valued benefit. The challenges of making new friendships in later life was discussed and it was felt that the U3A model offered what was rarely available: the opportunity to meet new people in a neutral situation. This was especially important for people without a partner.

Some participants consciously joined a U3A to make friends, and most had expanded their circle of friendships. This was often a driver if someone had recently retired from a demanding job or had just moved into a new area. The

ability to make friends while sharing a strong interest often assisted in strengthening the level of friendship and support. A common interest also made it easier for people to become friends, as well as to feel confident trying new interests in the company of new people.

Others were surprised at finding and making strong friendships. Their motivation for joining had been to find something interesting to do, but had then made strong friendships which had sustained them through difficult events.

"I met people who wanted to go with me for coffee, who wanted to talk to me, I have made good friends"

Some participants articulated the value of friendships as making them feel secure in their future. They felt that they would never be alone, and that there would always be people to meet and to look out for them. The feeling of having that circle of support was expanded into the community, where participants regularly bumped into others when out shopping, or walking, or elsewhere in their daily lives. One person said that each journey now takes much longer as they spoke to so many people on the way. People expressed that as a result of being part of a U3A community they felt more confident in new situations and more connected to their community.

It was also evident that the friendships begun in the U3A stretched far beyond it. Members spoke of giving exhibitions, or playing music, or playing pétanque outside of the U3A, and finding groups of members who would come and support them at external events.

It was commented that some people were passive recipients once they joined a U3A, and that in these cases reciprocity was not always in evidence. There was an irritation that not

everyone offers time and support. One member described the U3A as being like a bank: you can take things out regularly but, to keep it vibrant, you need to put things in now and again. The value of giving time and energy was seen as important.

"I started with serving the tea – people remember you as the guy who served the tea – then you can progress to the committee. You need to ask yourself, have you made a difference?"

Life changes

Finding mutual support within the U3A at times of upheaval or transition was seen as extremely beneficial.

Many participants spoke about people who had been bereaved whilst being part of the U3A. The membership offered support. A phrase used was that the U3A "folded around" the bereaved member, so they are safe in the knowledge that they are part of a group that cares about them. The U3A remains a focal point for those trying to redefine their lives and sometimes themselves in this situation. Several times, the phrase "it saved my life" was used. One participant suggested that offering membership to people after they have been bereaved may help them through the difficult time of readjustment.

The same "group care" approach was also evident when sickness was discussed. Members visited when a person was ill and offered support with shopping, making meals, posting letters and similar. Participants felt there was always someone to help. The feeling of support was described as having the potential to counteract the negative feelings brought on by illness.



Some also described occasions when they had faced multiple life changing events. Having the support of their fellow U3A members to help them cope, and enabled them to feel reassurance and fellowship.

"I have had a knee operation and three months after I got seriously ill... The closer U3A friends supported me, brought me cards, but everyone else asked how I was, checked that I was OK"

Moving areas, whether to an entirely new location or back to an area of earlier residency, was a time when support was valued. The U3A was described as enabling people to "dig foundations" in their new community. One person said that when new potential members arrived at a monthly meeting of the membership, within two minutes there would be a group of people welcoming them.

Other significant instances where the U3A had helped in the adjustment to changed circumstances included unexpected redundancy and managing the increasing care needs of a family member.

Self-confidence

It was clear that some members had surprised themselves by gaining confidence through participation in the movement. One person spoke of the danger of living in the past when you retire, and how participating in the U3A offers a new future.

The culture of inclusivity – valuing the person rather than their background – was seen as important for building confidence. Participants felt they were part of a team, where everyone's contribution was important regardless of whether they had many or no qualifications.

For others who had felt confident in their lives, participation provided an opportunity to keep the presence and abilities that they had used during their working lives. Often members were surprised that they were still addressing more than 70 people on a regular basis.

People spoke of the ability to redefine themselves, no longer feeling they were defined by work or by a partner. They also spoke of increased self-esteem. They found new confidence to develop new skills and a new voice and the ability for some to take on new roles on U3A committees. The ability to laugh at oneself through feeling accepted was valued.

Participating in study days and leading groups were seen as confidence-boosting opportunities. Often, there is trepidation at the beginning especially for people who have not spoken in public before. However, once the study day is completed, the consensus was that they would repeat the experience. This was referred to as the "springboard effect". In other words, the value of building confidence in people by offering them the opportunity to take responsibility. In addition, the importance of embedding the themes of volunteering and giving time was described as "selling not telling".

"There was a time when I didn't want to go outside, and then when I was out it took a lot to get back in again. I found coming to U3A I met people who had been in the same situation or worse and shared experiences"

Engagement with communities

U3As have engaged in a variety of partnerships in local areas. Particular examples included supporting local community halls,



community trusts, the parish council, libraries and taking part in community gardening groups. Some have active partnerships with other charities such as the local CVS (Council for the Voluntary Sector).

The Shared Learning Project (SLP) model was seen as a valuable way of connecting to local organisations in a more in-depth way. A SLP involves a team of U3A members, usually from different U3As, exploring a specific topic in conjunction with an institution (such as a museum, art gallery, stately home or library).

One example given was of an SLP that involved writing the history of a local church that had a hall used by the U3A. Separately, many U3As have partnerships with local universities to participate in, and assist with, research programmes.

One U3A has a programme in the community called 'Rubbish Friends', where members collect rubbish dropped by others, to improve the shared community space. Another was involved in a book club which after the closure of the local library was set up to offer books to the local community. Some questioned whether the U3A should get more involved in these type of programmes.

Some responses spoke about the value of the outreach that meeting in different public venues and different parts of the local community provides. Examples included a social

club, a working man's club, an art centre and a cathedral.

Others spoke of getting involved in charity fairs, dementia support days and village fetes, and most feel connected to their local communities. It was felt that if local communities are aware of U3As, it enables the membership to continue increasing.

One U3A was very involved in the local Jazz festival, which offered the opportunity to work with other organisations and raise their profile. Another belonged to a lifelong learning forum. Some U3As provided interest group sessions in residential homes and sheltered housing. Other U3As had actively been involved in exchange programmes with European organisations.

There was some concern to extend the reach of the movement by encouraging participation from local minority communities and from people who may feel less interested in joining as a result of their educational experiences. One U3A had a successful partnership with a school of art and a community centre, which has extended the local perception of a U3A. Another spoke about their involvement in developing a local community charity. There was general agreement that intergenerational collaboration was particularly satisfying.

It was agreed that good partnership working required effort, patience and determination. Relationships needed investment in time as they didn't happen overnight.

Other impacts

Overall, participants reflected on their contribution to the loneliness debate. There was a feeling that the U3A had something to add to this debate as it provided a different form of wellbeing. There was a conscious view that the U3A model was the antithesis of loneliness,

Conclusion



Much of the public debate on ageing is predicated on a deficit and dependency approach. The U3A model offers an alternative ageing experience, which is built on shared learning, skill sharing and volunteering.

The evidence from this research demonstrates the value of mutual aid and of reciprocity to confidence, self-esteem, and wellbeing. More importantly it demonstrates the value of communities of interest that are not defined by age, or by past experience, but instead are defined by the experiences still to be explored.

The model is low cost, defined by participants, and learner-led. It is not dependent on state funding; it has a life and existence of its own. It has a contribution to make to the lone-

liness debate, and to the ageing well debate. It has been quietly and continually making an impact in communities across the United Kingdom. 420,000 people have the U3A as part of their lived experience. The value of these volunteer-led organisations is significant.

Finally, the words of this contributor defines the impact of this movement.

“When you have worked all your life, how do you fill your life? You could sit within four walls...instead I have found friendships and new experiences, experiences that I would never ever have thought I had the chance to do...”

and, therefore, perhaps the focal point should be on having a wellbeing debate rather than one focused on loneliness.

Some members considered the impact on a community of the removal of a U3A, where so many people offer mutual support to each other with resulting health benefits. This is especially important considering that the U3A model uses no public resources. Participants reflected that without a U3A there was the possibility of people becoming more frail more quickly, and requiring public support. This would have a resulting detriment both to those individuals and to the local health and social care economy.

Consideration about the extent of the current reach of the movement was discussed. The total number of U3A members currently equates to approximately 3.5 per cent of the 11.8 million people aged over 65 in the UK. It is important, therefore, to consider both the impact and effect of further outreach.

Participants felt a key added benefit of participation was giving. They benefited by giving time and talent: participation was a vehicle to enjoy what they were good at. This giving was perceived to be a key part of keeping healthy, living well and living longer.

There was general agreement that more work on raising the profile of the movement at local, regional and national levels was important.

Challenges

The focus groups raised several areas as challenges, or areas to consider strategically.

Perception The U3A concept is not widely understood outside of the movement. Prior to joining some participants had thought it was an academic institution, or a political or religious group, or a group for frailer older people.

Mainly weekday activity A minor theme was whether there should be a more proactive move by U3As to extending more activity to evenings and weekends.

Embedding volunteering The importance of embedding the “giving” culture, or the principle of self-help and mutual aid, on a continuing basis was raised. The U3A is not a service.

The retirement offer It was suggested that U3As were actively involved in contributing to the successful retirement debate so that retirement sounded like an opportunity, rather than a challenge.

Extending the opportunity A consistent, active policy of recruitment was important for the future so that new people continue to join and the U3A stays vibrant.

Extending the offer to more sections of the community Encouraging participation from local minority communities, and from people who may feel less interested in joining as a result of their educational experiences, was a consistent theme

Attracting younger people who have retired The need to engage people in their late 50s and early 60s, and to remain relevant, was seen as important.

Appendices

Appendix A: Guiding Principles

The guiding principles of the U3A movement were produced by The Third Age Trust in 2014, and are based on the original Objects and Principles written by Peter Laslett in 1981.

The U3A Movement is non-religious and non-political and has three main principles.

The Third Age Principle

Membership of a U3A is open to all in their third age, which is defined not by a particular age but by a period in life in which full time employment has ceased.

Members promote the values of lifelong learning and the positive attributes of belonging to a U3A.

Members should do all they can to ensure that people wanting to join a U3A can do so.

The Self-help Learning Principle

Members form interest groups covering as wide a range of topics and activities as they desire; by the members, for the members.

No qualifications are sought or offered. Learning is for its own sake, with enjoyment being the prime motive, not qualifications or awards.

There is no distinction between the learners and the teachers; they are all U3A members.

The Mutual Aid Principle

Each U3A is a mutual aid organisation, operationally independent but a member of The Third Age Trust, which requires adherence to the guiding principles of the U3A movement.

No payments are made to members for services rendered to any U3A.

Each U3A is self-funded with membership subscriptions and costs kept as low as possible.

Outside financial assistance should only be sought if it does not imperil the integrity of the U3A movement.

Appendix B: Questionnaire

Participants were asked to respond to all relevant areas.

Does Your U3A help people to:

Make new friendships and feel supported?

Learn new skills?

Feel healthier?

Become engaged with your community?

Manage life changes, retirement, illness or bereavement?

Build Confidence?

Anything else?

Can you give any details examples?

Appendix C: Focus Group Questions

Why did you join the U3A?

What difference did joining the U3A make to you?

Research has shown that lifelong learning has a positive impact on participants in a number of areas. These include:

a) health; how does U3A participation (if at all) impact on your health and wellbeing?

b) friendships and feeling connected to others; how does U3A participation (if at all) impact on your opportunity to make friends and feel connected to others?

c) learning new skills; how does U3A participation (if at all) impact on your opportunity to learn new skills?

d) life changes such as retirement, illness, bereavement; how does U3A participation (if at all) impact on managing major life changes?

e) self-confidence; how does U3A participation (if at all) impact on building your self-confidence?

f) engagement with local communities; how does U3A participation (if at all) impact on your opportunity to engage with your local community?

g) are there any other impacts on your life of being part of your U3A that you feel are important?

Thank you for your participation

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Report co-ordination

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What if we told you that the solution to loneliness could cost just £20 a year?

The U3A learning model has a positive, cost-effective and sustainable impact on the wellbeing and future of retired people in the UK.

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