

# UNIVERSITY OF THE 3<sup>RD</sup> AGE (U3A): COMING TO CALGARY

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*The purpose of this descriptive case study is to promote understanding of the University of the Third Age (U3A) as an approach to facilitating lifelong learning opportunities for and with older adults. This case study is specific to the development of a University of the Third Age in Calgary (U3A Calgary). The benefits of lifelong learning for older adults and communities are described. The benefits are followed by the articulation of the work done by the project team in moving the U3A Calgary from an idea to reality.*

*Keywords:* Lifelong learning; older adults; serious leisure perspective; University of the Third Age

Healthy aging in a broad sense includes elements such as physical and emotional health, subjective well-being, and quality of life. To help promote healthy aging among older adults, participation in meaningful activities has yielded positive benefits. Engaging in these activities includes circumstances in which individuals express creativity, experience a sense of achievement, feel competent, or find pleasure (Cosco, Prina, Perales, Stephan, & Brayne, 2014; Eakman, Carlson, & Clark, 2010). Meaningful activities may take the form of educational courses offered at academic settings.

Attending school was traditionally perceived as age-based, and was intended to prepare children and adolescents to become adults and begin a career; however, this view has been more recently replaced by a belief in continuous learning. The more common term is lifelong learning. Lifelong learning can enhance one's understanding of the world, provide opportunities for new social relationships, and improve quality of life (Van Malderen, Mets, & Gorus, 2013).

Knowledge can be acquired and skills developed within many different settings. Instead of ending formal education at a specific age, individuals are encouraged to continue learning throughout their lifetimes, whether on their own through self-directed learning, in adult education classes, or in continuing education environments. To encourage this trend, European countries launched University of the Third Age (U3A) courses for older adults. This is a trend that has crossed the ocean and come to eastern Canada, and more recently to Calgary, Alberta. Discussed in this paper are the foundational elements to build a U3A in Calgary. While the initial development was a volunteer effort, the team hopes to delegate a full-time manager for the U3A Calgary.

## WHAT IS A UNIVERSITY OF THE THIRD AGE?

Formosa (2009) described the University of the Third Age as “sociocultural centres where older persons acquire new knowledge of significant issues, or validate the knowledge which they already possess” (p. 173). The World Health Organization (2002) supported the concept as a way of encouraging countries to better support their older adults, to make the aging process more

productive, and to revitalize society's respect for older adults in the ever-changing world of the twenty-first century.

The University of the Third Age emerged in France in the late 1960s, when legislation was passed requiring universities to provide more community involved education. In 1973, pioneering course work led by Pierre Vellas at the Toulouse University of Social Sciences led to the creation of the first U3A specifically for local retired people. Within a few years, the concept had spread to other universities in France as well as to universities in Belgium, Switzerland, Poland, Italy, Spain, and across the Atlantic to French speaking areas of eastern Canada, such as Québec and New Brunswick (IAUTA, n.d.). In the United States, similar programs were set up using terms such as "Elder Hostel" and "Life Long Associations." The U3A is not a university in the conventional sense as it is open to anyone over retirement age, no examinations are required, and no credentials or qualifications are offered. AgeUK (n.d.) described the U3A as a nationwide network of learning groups aimed at encouraging older adults no longer in full-time employment to share their knowledge, skills, and interests in a friendly environment. The UK model elected to use a social support approach, in contrast to the academic approach in France and some other European countries.

## **WHAT ARE THE BENEFITS FOR PARTICIPANTS?**

Education enables older adults to develop their talents to the full, achieve personal goals, and obtain enjoyment. Lamb and Brady (2005) investigated the perceived benefits of participation in a peer-governed and peer-taught older adult learning program. Participants reported benefits in 4 categories: intellectual stimulation, experiencing a nurturing and supportive community, enhancing self-esteem, and having opportunities for spiritual renewal. This finding has been substantiated in later studies. Alfageme (2007) found that a sample of older university students ranked educational issues, such as new knowledge, as the primary personal benefit of attendance. Over 50% of his respondents identified that their personal wellbeing had improved. Sloane-Seale and Kops (2008), through an exploratory study, examined the relationship between older adults' participation in educational activities and successful aging. Focus-group interviews were conducted on seniors' involvement in learning and their perceptions of its influence on successful aging. Their findings suggest that participation in educational activities potentially contributes to both physical and psychological well-being. Boulton-Lewis and Tam (2012), and Ordonez, Yassuda, and Cachioni (2011) reported similar benefits to lifelong learning. More recently, participation in a lifelong learning program has been demonstrated to enhance cognitive performance (Fernández-Ballesteros, Molina, Schettini, & del Rey, 2012). There are other benefits to lifelong learning; Joseph and Southcott (2015) wrote that participants in their phenomenological study joined a choir because of convenience, enjoyment of singing, a desire for social connections, and as an opportunity for personal validation.

Community well-being is a function of numerous factors working together to promote optimal quality of life for all community members. The promotion of lifelong learning among older adults can significantly contribute to community wellbeing (Merriam & Kee, 2014) and to positive intergenerational relationships for older adults (Lawton & LaPorte, 2013). Formosa (2010) reported that U3A involvement increased the social integration and harmony of older adults by maintaining their involvement within society. Lifelong learning can enhance one's social network and community and, consequently, social capital is developed (Boulton-Lewis, 2010). Narushima (2008), employing a case study design, reported that lifelong learning through Hirst, S., LeNavenec, C., & Stebbins, R. (2016). University of the 3<sup>rd</sup> Age (U3A): Coming to Calgary. Papers on Postsecondary Learning and Teaching: Proceedings of the University of Calgary Conference on Learning and Teaching, 1, 12-19.

community courses fostered a sense of the right to learn within the public domain. Universities of the 3<sup>rd</sup> Age present older adults with activities in which they can find meaning and personal satisfaction, as well as a means to both continue developing personally and to offer an endowment to their communities and society.

### **HOW IS THE UNIVERSITY OF THE THIRD AGE CALGARY BEING DEVELOPED?**

Through regular meetings spanning many months, the project team for the U3A Calgary undertook measures to create a development framework; a strategy that we thought would launch the U3A Calgary effectively. The team has been supported by Dr. Francois Vellas, an economics professor at the University of Toulouse, who is President of the International Association of Universities of the Third Age (IAUTA).

The framework consists of four steps: exploring the potential for the U3A Calgary, developing the foundation for it, implementing the U3A Calgary, and sustaining it. The steps are represented in Figure 1.

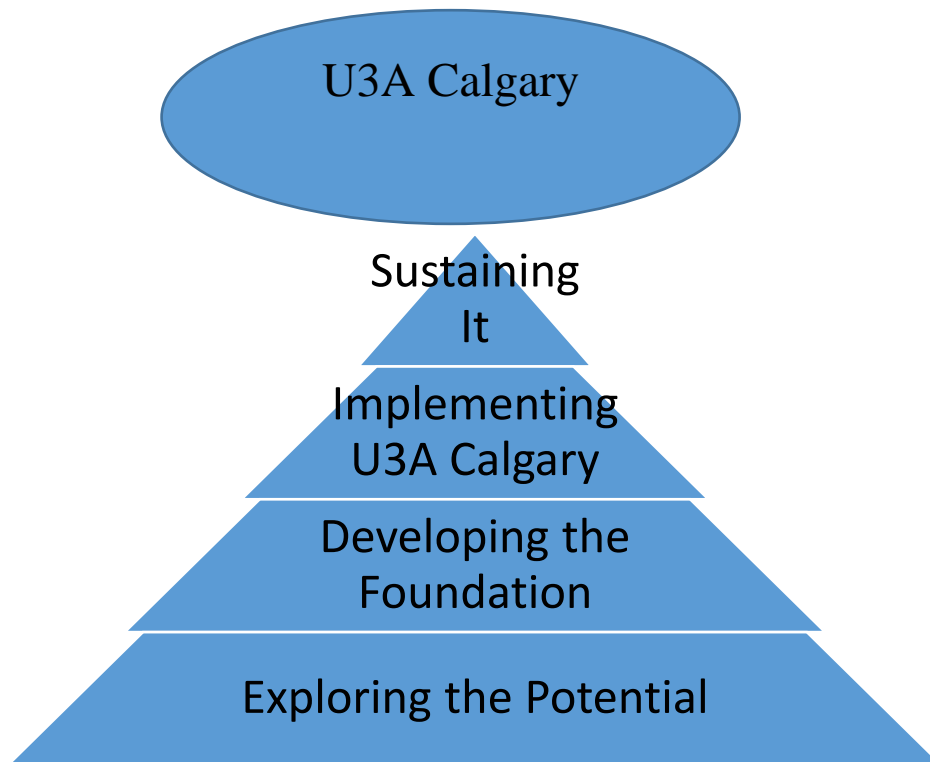


Figure 1. The Development Framework

Dividing the project into specific steps made it possible for the team to lead it in the best possible direction. In addition, the total work load of the project was divided into smaller components, making it easier to develop, implement, and evaluate. In the initial months, the project team tried to specify all the requirements that might be associated with the creation of the U3A Calgary as clearly as possible. However, they were very much aware that this is a “work in progress.”

14 Hirst, S., LeNavenec, C., & Stebbins, R. (2016). University of the 3<sup>rd</sup> Age (U3A): Coming to Calgary. *Papers on Postsecondary Learning and Teaching: Proceedings of the University of Calgary Conference on Learning and Teaching, 1*, 12-19.

## Exploring the Potential

Exploring the potential for the U3A Calgary is the initial step. It encompasses three basic elements: agreeing on the possibility of a U3A Calgary, assessing its operational viability, and identifying primary stakeholders. *Agreeing on the possibility of a U3A Calgary* describes stakeholders engaging in the development of a clear conceptual definition of the U3A Calgary to promote a shared understanding of it. This element aims to promote realization that the U3A Calgary is more than a classroom located within a university; it is an approach to integrated learning through experiences and a culture of learning. We needed to answer such questions as: How do we define education? Who is our target audience? How do we differ from other educational activities? What does success look like?

For the second element, *assessing the operational viability*, the project team needed to answer whether the U3A would address an identified lifelong learning gap in Calgary. Components of this element included an assessment of the legal viability of a U3A Calgary (fiduciary relationships, space agreements, insurance requirements, risk management); market viability (enrolment capacity, size of market, product marketing); technical viability (courses to be offered, physical resources, audiovisual equipment, faculty requirements), and financial viability (fees, payment options, faculty payment). Determining limitations was an important part of assessing operational viability, and this aspect was a fact-finding mission for the project team. At this step, it was important for the project team to identify and examine all possible sources of information, so conversation was initiated with the International Association of Universities of the Third Age and many of its national and international members.

The third element relates to the process of *identifying primary stakeholders* and exploring shared objectives for the U3A Calgary. Stakeholders are those who may be affected or have an effect on the project. The most important reason for identifying stakeholders is that it permits the project team to recruit them as part of the development effort. They may include individuals and groups who have a strong interest in the U3A Calgary for academic, philosophical, or other reasons. Successful teaching and learning require the faculty and the participants to be dedicated to the U3A Calgary. Both parties must understand their individual roles while maintaining an understanding of the values and objectives of the U3A Calgary.

## Developing the Foundation

The second step of the development framework encompasses the following requirements: formalizing a collaboration; committing to the structural requirements of the U3A Calgary; creating a formal agreement, operating policies, and procedures; and identifying the educational approach under which it would operate. *Forming a collaboration* is situated in a business relationship model. The project team believes that a successful business proposal must be one that is able to describe to the primary stakeholders what the U3A Calgary is in a clear and simple manner. The business structure for a U3A Calgary encompasses a shared vision between the project team, the Professor Emeritus Association of the University of Calgary and the University's administration. Initial talks with the Vice Provost have been positive but further work needs to be done.

*Committing to the structural requirements of the U3A Calgary* refers to the spaces available, such as classrooms, lecture halls, seminar rooms, as well as the responsibility for

booking and maintaining teaching technology, faculty and student space and supports, campus security for learners, parking, and signage.

*Creating a formal agreement, operating policies, and procedures* is required. A formal agreement with the University of Calgary is anticipated to provide space and related administrative items (e.g. fee collection) and with the Professor Emeritus Association to promote the availability of teachers. Operating procedures are currently being developed prior to the opening of the U3A Calgary and will potentially require refinement once it is operational. Examples include procedures related to tracking of participants, fee payments, and library use.

In *identifying the educational approach* for the U3A Calgary, the project team has decided to use the Serious Leisure Perspective (SLP) as developed by sociologist Dr. Robert Stebbins (2014), a Professor Emeritus in the Department of Sociology at the University of Calgary. It is our belief that this theoretical framework will promote social engagement and potentially contribute to mental well-being in the later years. Viewed from the SLP, the courses that will be developed represent interest groups and are considered to be Serious Leisure activities. He defined this concept of Serious Leisure as the systematic pursuit of an amateur, hobbyist, or volunteer activity that participants find so substantial, interesting, and fulfilling that in the typical case they launch themselves on a leisure career centred on acquiring and expressing its special skills, knowledge, and experience (Stebbins, 2014, p.4).

Stebbins (2014) maintained that for any activities to be considered serious leisure six distinguishing qualities must be present:

1. The occasional need to persevere,
2. The possibility of finding a career in the serious leisure role,
3. Significant personal effort based on specially acquired knowledge, training, experience and/or skill,
4. Several durable benefits or broad outcomes such as self-development, self-enrichment, self-expression, regeneration or renewal of self, feelings of accomplishment, enhancement of self-image, social interaction, belongingness, and lasting physical products of the activity (e.g., a painting, a scientific paper, piece of furniture). Self-gratification, or the combination of superficial enjoyment and deep fulfilment, is a further benefit.
5. The unique ethos that grows up around each instance of serious leisure, a central component of which is a special social world where participants can pursue their free-time interests, and
6. An attractive personal and social identity.

### **Implementing the U3A Calgary**

The third step focuses on implementing the U3A Calgary and it includes two elements: modality of approach and selection of faculty. In selecting the *modality of approach*, consideration was given to three distinct options, the first of which is similar to the model established in Eastern Canada, an on-line only format. Ways of delivering, receiving, and responding to course content are now available to those on both sides of the lectern. The development of the Internet has introduced a new world of potential to distance education. In addition to promoting interaction between faculty and older adult learners, these technologies have the capacity to change isolation of learning to interactivity among participants.

The second option for modality of approach is an entirely on-site one. However, this format would substantially reduce student enrollment because of challenges related to transportation, parking, and space requirements. One of the challenges for the development team is securing physical space in a university because of the demand for classroom and study spaces.

The third option is a combination of the first two modalities and is the format proposed by the development team for U3A Calgary. This format would provide course access to rural or urban based older learners when transportation or mobility challenges are present. The practical implication is that enrolment would potentially be greater, contributing to revenue income and more course options.

The *selection of faculty* is another element of implementation. The project team of U3A Calgary is cognizant of the substantial change U3A experienced when the concept reached Cambridge, United Kingdom in the early 1980s. The founders of the British model adopted an approach in which there was to be no distinction between the teachers and the taught (Laslett, 1989). Older adults would be the teachers as well as the learners and, where possible, would ideally participate in research activities. The peer teaching principle was based on the knowledge that experts from numerous disciplines and interests retire; consequently, there should be no need for older learners to have to rely on “second age” teachers.

This approach has been highly successful in Britain, as well as other countries such as Australia and New Zealand (Swindell, Vassella, Morgan, & Sayer, 2011). Advantages of this approach include: minimal course fees; accessible courses run in seniors’ centres, community halls, libraries, and settings other than on the main university campus; flexible timetables; negotiable curriculum; and a wide variety of course offerings. The project team highly values this peer-teaching approach.

## **Sustainability**

The final step includes funding for sustainability, promoting the U3A Calgary, and assessing its success. Funding stability is of serious concern to the project team. Different U3A funding approaches have developed over the past four decades. Some U3As are primarily university funded; some are funded by a combination of fees, donations, and direct financial subsidy from the various levels of government; and some are mainly participant funded on a sliding scale. Increasingly, U3As are placing more of the responsibility on participants to pay for courses and facilities, perhaps as a reflection of difficult economic circumstances. The U3A Calgary project team is learning from funding models used at other U3A sites.

In 2010, an alliance of U3As was formed in Australia, and in 2014 that body started to receiving government funding (U3A Alliance Australia, 2014). However, this support came with an increase in bureaucracy that was challenging for the U3A volunteer base to manage. The relationship between an independent organization and the local university in a small Canadian city provides another example of a funding model. The Kamloops Adult Learners Society (KALS) was established a decade ago with two stipulations: that the learners be retired and that peer-learning be a fundamental principle. Some of its course offerings have been taught by its membership and community members, but, increasingly, some have been taught by volunteer retired or current instructors from Thompson Rivers University. Through self-governance, partnering with community organizations, and engaging volunteer instructors, KALS has kept tuition low, promoted accessibility to lifelong learning, and enhanced the lives of older adults. A similar model of sustainability is drawn from the University of the Third Age Swansea, which is Hirst, S., LeNavenec, C., & Stebbins, R. (2016). University of the 3<sup>rd</sup> Age (U3A): Coming to Calgary. Papers on Postsecondary Learning and Teaching: Proceedings of the University of Calgary Conference on Learning and Teaching, 1, 12-19.

a self-funded, charitable co-operative of adults who are no longer in full-time employment. In early 2014, it signed a memorandum of agreement with the University of Swansea, Wales to support their similar commitment to lifelong learning and community engagement for older adults.

The funding model selected by the project team will influence the sustainability of U3A Calgary. At the time of writing, no final decision has been made. However, a focus group with key stakeholders tentatively scheduled for the fall of 2016 will consolidate the funding model to be employed.

*Promoting the U3A Calgary* will be an ongoing strategy to create sustainability for the initiative. Once the U3A Calgary is operational, the focus will change to the development of strategies to market it, sustain interest, and quality improvement. This requires the project team to work together with the primary stakeholders to develop new possibilities for advancing the U3A Calgary initiative in ways that are mutually beneficial. Part of this work lies in the strengthening of community connections. To be successful, the U3A Calgary must be recognized as a community resource for older adult learning. This means communicating with all stakeholders on a periodic basis to ensure that information is exchanged to help organize, implement, and evaluate policies, procedures, resources, courses, and ways of course delivery to sustain the U3A Calgary.

There is also a need to *assess the success* of the U3A Calgary. Several strategies will be used to assess the impact of the U3A Calgary on teachers and older learners. Once the courses are developed, we will do an analysis of them using a multiple case study design, to identify which of the above distinguishing qualities of Serious Leisure tend to predominate. Findings will be incorporated for further enhancement of the U3A Calgary.

## CONCLUSION

The U3A provides opportunities for older adults to come together and learn together, not for qualifications but for its own reward: the sheer joy of discovery through the pursuit of active and fulfilling life. Establishing a University of the Third Age in Calgary has the potential to significantly contribute to the quality of life of older adults in this city and surrounding communities. As the older adult population continues to grow, there is growing appreciation of the positive outcomes of third age learning.

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