

# Four decades of Universities of the Third Age: past, present, future

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## **ABSTRACT**

This paper discusses the origins and development of Universities of the Third Age (U3As) whilst also forwarding suggestions for possible roles, opportunities and directions in the future. The U3A has been rightly described as both an idea and movement, as each centre has a local foundation and relatively unique features. Whilst some U3As are attached to traditional universities and colleges, others are sturdily autonomous and wholly dependent on the efforts of volunteers. One also finds a variety of ethos, ranging from the provision of a traditional type of liberal-arts education, to the organisation of interest-group activities conducted through peer learning, to showing solidarity with vulnerable sectors of the older population. Academic commentaries on the U3A movement have been both supportive and critical. Whilst U3As have been lauded for leading older learners to improved levels of physical, cognitive, social and psychological wellbeing, other reports emphasise how many centres incorporate strong gender, social class, ageist and ethnic biases. One hopes that in future years the U3A movement will continue to be relevant to incoming cohorts of older adults by embracing a broader vision of learning, improving the quality of learning, instruction and curricula, as well as a wider participation agenda that caters for older adults experiencing physical and cognitive challenges.

**KEY WORDS**– Universities of the Third Age, older adult education, educational gerontology, late-life learning.

## **Introduction**

The second half of the twentieth century witnessed a proliferation of educational institutions catering exclusively to the learning needs and interests of older adults (Findsen and Formosa 2011). The University of the Third Age (U3A), founded in 1972, has become one of the most successful institutions engaged in late-life learning. U3As can be loosely defined as socio-cultural centres where older persons acquire new knowledge of

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significant issues, or validate the knowledge which they already possess, in an agreeable milieu and in accordance with easy and acceptable methods (Midwinter 1984). Its target audience is people in the third age of the lifecourse – that is, a life phase ‘in which there is no longer employment and child-raising to commandeer time, and before morbidity enters to limit activity and mortality brings everything to a close’ (Weiss and Bass 2002: 3). The U<sub>3</sub>A movement has not only withstood the test of time but is also marked by an extensive increase of centres and members all over the five continents. In 2011, Australia and New Zealand included 240 (69,086 members) and 65 (11,336 members) U<sub>3</sub>As, respectively, whilst figures for Britain reached 798 U<sub>3</sub>As with some 269,750 members (The Third Age Trust 2011). In 2008, the number of Chinese U<sub>3</sub>As reached 40,000 with over 4.3 million members (Swindell 2011). The goal of this article is to take stock of four decades of U<sub>3</sub>A activity. First, it traces the genealogy of the U<sub>3</sub>A movement by highlighting its origins, developments and contemporary structuring. Second, it underlines the successes and achievements of U<sub>3</sub>As in improving the quality of life of older persons. Third, it goes beyond functionalist rationales by documenting lacunae that may characterise U<sub>3</sub>As. Finally, it engages a discussion of the possible future roles, opportunities and directions for U<sub>3</sub>As.

## Universities of the Third Age

### *1972–1980: French origins*

Following legislation passed by the French government in 1968 which made universities responsible for the provision of lifelong education, the summer of 1972 saw Pierre Vellas co-ordinating at the University of Toulouse a summer programme of lectures, guided tours and other cultured activities, for retired persons (Radcliffe 1984). Surprisingly, when the programme came to end the enthusiasm and determination of the participants showed no signs of abating, so that Vellas was ‘forced’ to launch a new series of lectures for retirees for the forthcoming academic year. Vellas (1997) formulated four key objectives for this new educational enterprise, namely (a) raising the quality of life of older people, (b) realising a permanent educational programme for older people in close relations with other younger age groups, (c) co-ordinating gerontological research programmes, and last but not least, (d) realising initial and permanent education programmes in gerontology. The first U<sub>3</sub>A was open to anyone who had reached statutory retirement age in France at that time, and who was willing to fill in a simple enrolment form and pay a nominal fee. Learning activities were scheduled for daylight hours, five days a week, for eight or nine months

of the year. After the programme was marketed on a limited basis, 100 older persons attended the opening session for the 1972–73 academic year (Philibert 1984). Teachers were highly enthusiastic about the motivation and sheer human warmth displayed by older students, and marvelled at the way they learnt with new techniques such as audio-visual language laboratories. The first U<sub>3</sub>A curriculum, at Toulouse, focused on a range of gerontological subjects, although in subsequent years subject content became mainly in the humanities and arts (Vellas 1997). The Union French University of the Third Age was founded in 1980 and quickly sought to clarify the meaning of the word ‘university’ in the title, and therefore, which kinds of U<sub>3</sub>As are eligible to become members (Radcliffe 1984). The dominant view was that U<sub>3</sub>As should strive to maintain high academic standards by holding direct links with recognised and established universities, and to uphold the credibility of the label ‘university’ by increasing the proportion of university academic staff (Radcliffe 1984). As a result, although lectures were combined with debates, field trips, and recreational and physical opportunities, the French academic maxim of ‘teachers lecture, students listen’ was constantly upheld (Percy 1993: 28). Indeed, all U<sub>3</sub>As during the 1970s operated through a more or less strictly ‘top-down’ approach, where the choice of subjects and setting of course curricula was the responsibility of university academics, and with learners expected to show deference to the intellectual eminence of university professors.

In retrospect, there was nothing exceptional about this programme apart from the fact that a section of a large provincial university had taken an interest in ageing and decided to enlist the resources of the university in programmes for senior citizens. Yet, the Toulouse initiative struck a rich vein of motivation so that just three years later U<sub>3</sub>As were already established in Belgium, Switzerland, Poland, Italy, Spain and Quebec in Canada (Swindell and Thompson 1995). The U<sub>3</sub>A phenomenon struck a rich vein of motivation because retirees perceived such centres as offering them the possibility to continue engaging in physical and cognitive activities even beyond retirement, and to keep abreast of physical, psychological and social changes occurring in later life (Glendenning 1985). This may be because the U<sub>3</sub>A movement was in marked contrast to the tradition of centralised educational management, and provided an opportunity to sow the first seeds of educational innovation and reform. In Radcliffe’s (1984: 65) words, ‘the U<sub>3</sub>A was in some measure an expression of a counter-culture, the resort of those to whom a fair measure of educational opportunity has been denied . . . a challenge in support of the right to life-long education’.

*1981–1990: The British renaissance*

As the U<sub>3</sub>A phenomenon gained increasing international recognition, it did not escape the attention of British educators and gerontologists. The first U<sub>3</sub>A in Britain was established in Cambridge, in July 1981, and quickly replicated in other cities and towns (Midwinter 2004). The British version underwent a substantial change compared to the original French model, with Midwinter (1984: 3) going as far as to describe the use of the title ‘U<sub>3</sub>A’ as ‘an unashamed burglary of the continental usage’. Rather than being incorporated within social science, education or theology faculties inside traditional universities, British U<sub>3</sub>As embraced a self-help approach based upon the principle of reciprocity, of mutual giving and taking. Self-help groups include people coming together to assist each other with common problems, providing mutual support and an exchange of information, whilst being typified by minimal social distance between them (Brownlie 2005). The self-help model holds immense potential for late-life education since experts of all kinds retire with the skills and interest to successfully increase both the number and range of resources available. The key objectives stipulated for British U<sub>3</sub>As, according to one co-founder, included

... to educate British society at large in the facts of its present age constitution and of its permanent situation in respect of ageing ... to create an institution for those purposes where there is no distinction between those who teach and those who learn, where as much as possible of the activity is voluntary, freely offered by members of the University ... to undertake research on the process of ageing in society, and especially on the position of the elderly in Britain ... (Laslett 1981, quoted in Laslett 1989: 177–8)

The hallmarks of British U<sub>3</sub>As include their sturdy independence and anti-authoritarian stance (Huang 2006). Aspiring to instigate a democratic movement that enriches the lives of older adults through the development of a range of learning, action and reflection opportunities, British U<sub>3</sub>As declined to form part of ‘the official, state-founded, established structure with its professional teachers and administrators’ (Laslett 1989: 174). Instead of developing into campus-based organisations (although the Lancaster and London U<sub>3</sub>As were notable exceptions), British U<sub>3</sub>As were more akin to Illich’s (1973) visions in *Deschooling Society*, which stressed the oppressive and ineffectual nature of institutionalised education, on the basis that whilst institutionalised learning undermines people’s confidence and undermines their capacity to solve problems, the so-called experts (that is, teachers) tend to self-select themselves and act as gate-keepers of what should be learnt in life. Illich (1973) argued that a more promising education system is characterised by more fluid and flexible forms of learning that include three key purposes: providing easy access to learning resources, facilitating the

sharing of knowledge, and creating opportunities for the transferring of skills – all of which are found at the core of the British U3A model. Indeed, programme directors rejected the idea of pre-packaged courses for more or less passive digestion, and instead demanded a kind of intellectual democracy where all members would be expected to participate in teaching and learning. Since in the absence of any financial and administrative support from official authorities sessions often take place in members' own homes, British U3As are also successful in promoting what Illich (1973: 110) termed as 'learning webs' – that is, 'reticular structures for mutual access . . . to the public and designed to spread equal opportunity for learning and teaching'. In Midwinter's (1984: 4) words, the British U3A movement 'cocks a perky snook at the conventional university', with the term 'university' used in the medieval sense of fellow students 'joined together in the selfless pursuit of knowledge and truth for its own sake'.

In retrospect, the French and British U3As models were a product of particular socio-political contexts (Glendenning 1985). The 'extra-mural' character of the former model followed legislation passed by the French government in 1968 which required universities to provide opportunities for lifelong education in collaboration with all interested parties. Hence, the French U3As had legislation on their side, together with a conviction that education for older adults was a necessary part of universities' responsibilities, so that it is not surprising that their key distinguishing feature is their association with established universities and government departments responsible for the welfare of older people. On the other hand, the proposals of the working party on 'Education and Older Adults' set up by the British Universities Council for Adult and Continuing Education in 1982 elicited a poor response from universities and political parties (Glendenning 1985). Hence, British U3As had no other alternative but to adopt the principles of self-help learning, as evidenced from their strong will to remain free of universities, autonomous from local authorities, and to downplay traditional credentials. As one of its co-founders claimed, 'our view was always that Third Agers should be liberated to organise their own affairs and invent their own destiny . . . [U3As] are all about older persons being the creators, not the recipients, of a service' (Midwinter 2003: 1, 2).

### *1991–2011: Contemporary developments*

The U3A movement has gone a long way since its inception. In 2008, the International Association of Universities of the Third Age (IAUTA) included memberships from U3As situated in 23 different countries, although U3As are present in more than 60 countries (Swindell 2012). IAUTA organises a biennial international congress and encourages collaborative

projects between U<sub>3</sub>As situated in different countries. Another productive organisation is WorldU<sub>3</sub>A. Founded in 1997, it encourages international contacts between U<sub>3</sub>As through internet activity. One of its invaluable projects consists of the ongoing 'technological support' email list moderated by U<sub>3</sub>A members which provide rapid answers to technology-based problems (Swindell 2012).

Although many centres still follow either the French or British traditions, there are at present four other models: the 'culturally-hybrid', 'French-speaking North American', 'South American' and 'Chinese' types (Levesque 2006). Culturally-hybrid U<sub>3</sub>As include both Francophone and British elements. For instance, U<sub>3</sub>As in Finland are affiliated with a university programme, use university resources, but then rely heavily on 'local learning groups' of older people to define the curricula so that they are characterised by an open-door policy and are essentially co-operative unions (Yenerall 2003). The U<sub>3</sub>A in Malta also combines Francophone and Anglophone characteristics by having lectures by university-based professors as well as interest-group sessions under the guidance of members (Formosa 2012). French-speaking U<sub>3</sub>As in Canada form part of a traditional university, but then are seriously intent on blurring the distinction between higher education and third-age learning. For instance, the U<sub>3</sub>A in Montreal established a Bachelor of Arts degree programme to meet the complex needs and interests of the third-age population whereby admission requirements included 'appropriate former studies or self-taught knowledge' and 'sufficient knowledge of both French and English' (Lemieux 1995: 339). South American U<sub>3</sub>As are also close to the Francophone model as they are characterised by an institutional link to a host university where the link is regarded as self-evident as much from the university's point of view as from that of the members. However, South American U<sub>3</sub>As are also typified by a strong concern for the most deprived and vulnerable sectors of the older population (Levesque 2006) – which is surely very atypical to the Francophone model whose value orientations tend to be apolitical, and at times, even elitist (Formosa 2007). Finally, Chinese U<sub>3</sub>As make use of a number of older revered teachers who are paid a stipend, and older and younger unpaid volunteers, to teach a curriculum which covers compulsory subjects such as health and exercise, as well as various academic and leisure courses ranging from languages to philosophy to traditional crafts (Swindell 2012). U<sub>3</sub>As in China adopt a holistic perspective towards learning, and hence, are much concerned with the maintenance and development of citizenship, cultural consolidation, philosophical reflection and bodily harmony. Of course, there are U<sub>3</sub>As which do not fit any of the models expanded herein. U<sub>3</sub>As in Taiwan are neither attached to universities nor are they self-help organisations. Instead they have been established,

managed and financed by local authorities, with teaching carried out by professional teachers (Huang 2005).

U3As are no exception to the e-learning revolution. Although initially the primary scope of experimentation with online courses was solely to reach out to older persons who could not join their peers in the classroom setting such as those living in remote areas and the homebound (Swindell 2000, 2002), this stance soon changed. As internet connection became a dominant feature of daily living in later life so that in New Zealand, Canada, Sweden and the United States of America (USA) at least 38 per cent of the population aged 65 plus go online (Pierce 2008), and once the coming of the Web 2.0 internet revolution – with its Blogs, Wikis, Moodle and Podcasts – brought the possibility for interactive learning to previously unimaginable levels, it became evident that virtual learning can provide a reliable and valid experience both on its own and to everyone irrespective of social and health status (Swindell, Grimbeek and Heffernan 2011). Success stories include U3AOnline co-ordinated by tutors located in Britain, Australia and New Zealand, the online courses co-ordinated by the British federation of U3As, and the Virtual University of the Third Age. The administration of U3A Online, set up in 1998, is carried by volunteers and learning takes place by electronic forum, email and Skype. One strength of volunteer-based virtual learning is that it has few expensive overheads as there are no salaries to pay, no expensive insurance costs, and no health and safety concerns, so that annual membership costs for U3A Online amount only to Aus \$25 (Swindell 2011). In early 2011, ‘39 courses were available to U3A Online members with others in various stages of completion . . . free to members for self-study and are available 365 days a year’ (Swindell 2012: 46).

### **Contributions of U3As**

Irrespective of the geographical context, U3As must be credited for providing an opportunity for older adults to participate in lifelong learning, and therefore, contributing strongly towards the ongoing construction of societies where people age positively. U3As play a key role in the democratisation of lifelong learning by providing educational opportunities to a sector of the population that is generally left out in the cold as far as learning is concerned. Indeed, one does not have to go back many years to find a time when it was widely thought that intelligence declined with age, and that older adults could not learn anything novel – as in the traditional adage of ‘you cannot teach an old dog new tricks!’ It is noteworthy that the founding of U3As represented the first real possibility

for older citizens to participate in non-formal learning, with this movement being instrumental in influencing the inclusion of older adults in 'lifelong learning' policies.<sup>1</sup> Indeed, the United Nations' *Madrid International Plan of Action on Ageing* states that 'the role played by educational institutions for older persons, such as by universities of the third age, needs to be further recognized and supported' (2002: para. 47). U3As also ensure a higher visibility of third agers as independent, industrious and creative citizens. They militate against the widespread stereotypes of older persons as a needy and dependent group, as passive takers and recipients of pensions and welfare services. Moreover, the empowering potential of U3As is not to be underestimated since participation in lifelong learning can provide learners with a platform whereby they can voice their opinions. In the Irish context, U3As have been credited for providing a physical space 'where ageing groups are getting together . . . [to] get the government to understand that older people also have a voice' (Blackrock U3A member, Ireland, cited in Bunyan and Jordan 2005: 271).

Various studies applaud U3As for having direct health benefits for members (Sonati *et al.* 2011; Swindell 2012). Admittedly, at present there is no rigorous research programme investigating the relationship between U3A membership, on one hand, and improvement in physical and cognitive wellbeing, on the other. It is surely not the intention here to argue in favour of some strong causal relationship between learning and an improvement in physical/cognitive wellbeing in later life since, as Withnall (2010) argues, most research in this field has tended to proceed on the basis of a range of clinically unproven assumptions. It remains, however, that there are many valid and reliable studies showing how continued mental stimulation in later life aids learners to, at least, maintain their physical and cognitive health status (Cohen 2006; National Seniors Australia 2010). Wrosch and Schulz's (2008) findings that older adults who were proactive and persistent in countering health problems experienced greater physical and mental health benefits augurs well, since most U3As offer various courses on health promotion and illness prevention. In this respect, the fact that Australian elders perceive their U3A membership to have improved their health status is surely encouraging:

If you're active, and you're active in your mind then, yes, it does make a difference to your health . . . but if you were sitting down doing nothing, well your system's not working – the brain's not working. And if the brain starts to get slack or just doing nothing it transmits to the rest of the body and the rest of the body becomes slack. (Liverpool U3A member, Australia, cited in Williamson 1997: 180)

The study of Sonati *et al.* (2011) in Brazil also underlined the role of U3As in augmenting elders' physical health. The Piracicaba U3A was found to



function to preserve members' 'fat-free mass' levels by decreasing and improving their levels of inactivity and physical exercise, respectively, factors which are crucial to, at least, maintaining, wellbeing in later life.

U<sub>3</sub>As also hold a potential to lead learners towards improved levels of psychological capital. Studies have uncovered an association between participation in U<sub>3</sub>As and improved levels of self-assurance, self-satisfaction, self-esteem and sense of coherence, on one hand, and a decline of depressive and anxiety symptoms, on the other (Formosa 2000; Zielińska-Więczkowska *et al.* 2011, 2012). This implies that engagement at a U<sub>3</sub>A centre can have therapeutic functions towards the adjustment of older adults with their ageing and retirement transitions. Indeed, a study on the relationship between psychological wellbeing (autonomy, personal growth, control, positive relationships with others, purpose, personal acceptance and generativity) and participation in the São Paulo U<sub>3</sub>A in Brazil concluded that 'the students [*sic*] who had been longer on the program run by the institute studied, exhibited higher levels of subjective and psychological well-being... where the satisfaction and benefits gained [from learning] extend into other areas of life' (Ordonez, Lima-Silva and Cachioni 2011: 224). Turning our attention again to the Irish context, Whitaker's (2002, quoted in Bunyan and Jordan 2005) research concludes that U<sub>3</sub>A participation helps to develop confidence as learners realise the value of the knowledge that they share with others. She notes that by participating in U<sub>3</sub>As members get their life experiences recognised and appreciated, and learn how to get beyond the critical voice that tells us we 'aren't good enough' or 'that we have nothing to say'. Elsewhere, Irish participants also disclosed how U<sub>3</sub>As helped them to improve their confidence in their abilities in information and communication technology (Bunyan and Jordan 2005).

U<sub>3</sub>As are also recommended for resolving the tensions arising from the push towards the productive use of one's free time and the pull of 'liberation' or 'well-earned rest' of retirement. As Walker (1998) affirmed, whilst 'for some of its members, U<sub>3</sub>A may function as a springboard experience... others find their aspirations completely met within U<sub>3</sub>A activity'. Similarly, Ellis and Leahy (2011) report that when members are asked what they gain from their involvement in U<sub>3</sub>A activities, the first thing that they usually report is not generally related to the learning activities *per se* but the associated social outcomes such as socialising, making new friends who share their interests, having the opportunity to achieve personal growth, and finding a support group which helps them through difficult periods in their personal life. In other words, for many U<sub>3</sub>A members it is not 'learning' as such that enticed them to enrol and keep on participating, but the 'sheer fun' that accompanies such an activity. This is because U<sub>3</sub>A centres are

typified by a sense of vitality and dynamism that go beyond what is usually the case in a normal adult education centre, to the extent that many feel that their membership gave them a new lease of life. For instance, the co-ordinator of the U3A in Malta noted how during his tenure he witnessed the U3A injecting members with a novel sense of purpose: ‘retired teachers have gone back to part-time teaching of English to foreign students, others have started hobbies related to their former work, [whilst] others who used to read very little, if at all, have discovered a new world opening up to them’ (Schembri 1994: 21). Elsewhere, members in Irish U3As also commented at length on the social aspects of the learning environment:

What I like is the idea of meeting people from different walks of life, that have been in a different area to what I have been, and different experiences. And it’s lovely chatting with somebody and you learn quite a lot from their way of life and what they thought about different things. And I also think in this group there’s a warm . . . friendship . . . you feel at home. (Blackrock U3A member, Ireland, cited in Bunyan and Jordan 2005: 270)

The e-learning travails of the U3A movement have also been providing low-cost learning opportunities for older people. One finds considerable anecdotal evidence showing that this process is making a considerable improvement to the quality of life of individual older adults:

I’ll go as far as to say that being totally absorbed in my most recent online course has saved my sanity this year . . . I am deaf – communicating online is wonderful for me. I am sure that is true for other people with disabilities of many kinds. (U3AOnline member, cited in Swindell, Grimbeek and Heffernan 2011: 130)

Finally, it is noteworthy that the majority of U3As only exist because of time-consuming work on behalf of volunteers. In the United Kingdom (UK), the balance of volunteers to staff is overwhelming, with over 250,000 members and only 14 staff at the national office, half of them part-time (Cox 2011). In Italy, 57 per cent of tutors are volunteers (Principi and Lamura 2009). The economic value of U3As has been efficiently gauged by Swindell who, instead of modestly letting the record of voluntarism speak for itself, calculated an actual monetary figure for the work that third-age volunteers donate to many sectors of the Australian and New Zealander U3As. His latest calculations are of Aus \$21 million and Aus \$1.9 million for Australian and New Zealand U3As, respectively (Swindell *et al.* 2010). Whilst 22 per cent of volunteering time was generally spent on administrative issues, the remainder consisted of actual tutoring hours. Swindell’s estimates provide proof to the claim that the U3A phenomenon enables the government to spend less on welfare and civic programmes targeting the improvement of the quality of life in later years, as well as challenging the orthodox beliefs of ageing as a period of loss and decline, and that older adults are simply

recipients of welfare and consumers of public funds. The U<sub>3</sub>A phenomenon also problematises Putnam's (2000) argument that civic participation has declined in the latter part of the 20th century, whilst backing Freedman's (1999: 19) claim that older adults have become the 'new trustees of civic life'. Undoubtedly, the U<sub>3</sub>A phenomenon is a strong affiliate in the 'civic enterprise' movement. Although U<sub>3</sub>As are not political enterprises, and thus do not promote any kind of political activism, they do encourage older persons to become involved in helping others in the community. U<sub>3</sub>As enrich societies with opportunities for greater fulfilment and purpose in later years, and therefore, enable older adults to reach improved levels of active, successful and productive ageing. Indeed, the U<sub>3</sub>A approach provides a sustainable policy model for how future governments might capitalise on the productive resources of the increasing numbers of expert retirees.

### **Issues and predicaments**

Despite the aforementioned contributions of U<sub>3</sub>As to society in general and older persons in particular, what appears to be a straightforward exercise in facilitating learning opportunities for older adults is also fraught with widespread misconceptions and biases. In some ways, and especially from a logistical perspective, U<sub>3</sub>As have become victims of their own success. The triumph of U<sub>3</sub>As in attracting more learners is giving rise to problems in locating suitable venues large enough to accommodate the membership body, and enough volunteers to administer and run courses of study and interest-groups. This is especially the case for U<sub>3</sub>As following the self-help model who may not possess sufficient funds to employ administrative staff and who are reluctant to implement or increase enrolment fees as this is perceived to undermine the self-help character of the organisation. Indeed, during the early 1990s some Australian U<sub>3</sub>As had no other option than to cap memberships in order to ensure that members could be accommodated in the already over-stretched facilities of centres, as well as operate waiting lists (Picton and Lidgard 1997). Laslett's (1989: 178) objective for U<sub>3</sub>As to 'undertake research on the process of ageing in society' has also emerged as a contentious issue. Laslett thought that U<sub>3</sub>A members are in an ideal situation to undertake research that would counter not only the predominance of ageist literature on the ageing process but would also function 'to assail the dogma of intellectual decline with age' (1989: 178). Although initially one witnessed some level of participation on behalf of U<sub>3</sub>As in a number of research projects, it must be acknowledged that most U<sub>3</sub>As neither participate in nor produce research. Most U<sub>3</sub>A managers are occupied with the demands of day-to-day organisation, and research is not

amongst the members' high priorities. As Katz (2005: 156) claimed, members 'are seeking an education apart from formal accreditation institutions, and Laslett's mandate to create an alternative, Third Age research base [appears] to be daunting'.

Although U<sub>3</sub>As following the Francophone model are more able to access funds, retain nominal enrolment fees (as they make free use of university resources), and implement easily any course that strikes the fancy of members due to the large pool of teaching personnel at the university/college, they are not devoid of limitations. Lectures generally take place upon university campuses which tend to be far away from village and city centres, and hence, inaccessible for many older adults (Picton and Lidgard 1997). They are also characterised by a lack of agency over the ethos and direction of the U<sub>3</sub>A, as usually the academic body has the last say on every matter and total decision-making power on the most fundamental aspects (Formosa 2000). For instance, the drive behind the founding of the U<sub>3</sub>A in Malta arose neither from responses to community needs nor from requests by older persons themselves, but from the aspirations of academics working in the field of ageing (Formosa 2000). As a result, it is governed by a 'mission statement' that was written and developed exclusively by university academics without any consultation with age-interest groups or older persons.

Irrespective of the type of organisational model being followed, research has found U<sub>3</sub>As to incorporate a number of crucial biases. A consistent criticism levelled at U<sub>3</sub>As is that of elitism as there is a compounding class divide affecting chances to seek membership (Alfageme 2007; Formosa 2000, 2007; Picton and Lidgard 1997; Radcliffe 1984; Swindell 1993). Although U<sub>3</sub>As offer no hindrances or obstacles to membership, membership bodies tend to be exceedingly middle class. Educators have long commented how 'threatened . . . by elitism and pastime activism, U<sub>3</sub>As might indulge in narcissism and escapism and miss altogether the highest vocation they should respond to' (Philibert 1984: 57), and how U<sub>3</sub>As 'pandered to the cultural pretentious of an aged bourgeoisie who had already learned to play the system' (Morris 1984: 136). This occurs because older adults who have experienced post-secondary education, and have advanced qualifications and skills, are already convinced of the joy of learning so that their motivation to enrol in U<sub>3</sub>As is very strong. To middle-class elders, joining means going back to an arena in which they feel confident and self-assured of its outcome and development. On the other hand, working-class elders are apprehensive to join an organisation with such a 'heavy' class baggage in its title. Moreover, the liberal-arts curriculum promoted by most U<sub>3</sub>As is perceived as alien by working-class elders, who tend to experience 'at-risk-poverty' lifestyles, and are more interested in practical knowledge related to

lifelong work practices. Formosa (2000) argues that U3A may actually be serving as a strategy for middle-class elders to offset the class-levelling experience resulting from retirement. In the way that books and paintings are used to impress friends and other social viewers, membership is employed as a strategy of class 'distinction'.

U3As have also been criticised for including gender biases that worked against the interests of both men and women. On one hand, all surveys uncover a positive women to men ratio: 3:1 in the UK and Malta (Midwinter 1996; National Office of Statistics 2009), 4:1 in Australia (Hebestreit 2006), and 2.5:1 in Spain (Alfageme 2007), to mention some. It may seem that this gender imbalance is because women have higher life expectancies and (in some places) leave employment at an earlier age than men. While such explanations do make sense, they fail to explain why older women choose to enrol in U3As and overlook the common pattern that married women retirees remain accountable for most domestic responsibilities. At the same time, the high participation rates of women do not necessarily imply that U3As are fulfilling some beneficial roles towards them. The reality, in fact, is otherwise, as studies point out how U3As may serve to anchor female members in gender expectations about women's traditional roles. For instance, women tend to be less visible in mixed classes at U3As where male learners are more likely to dominate any discussion even when in the minority (Bunyan and Jordan 2005). Formosa (2005) also noted how the Maltese U3A was characterised by a 'masculinist' discourse where women are silenced and made passive through their invisibility, an outnumbering of male over female tutors, and a perception of older learners as a homogenous population which contributed towards a 'malestream' learning environment. However, this is not the same as saying that men enjoy preferential treatments in U3As. The low percentage of men signals strongly that for a number of reasons the organisation is not attractive to them. First, U3As are promoted through avenues—such as during health programmes on the broadcasting media or through leaflets at health centres—where most of the clients are women. Second, U3As are exceedingly 'feminised'. Not only is the membership mostly female, but so are management committees (Williamson 2000). As Scott and Wenger (1995: 162) stated, older men tend not to want to become involved with older people's organisations they perceive to be dominated by women. Third, U3A courses tend to reflect the interests of the female membership. Health promotion courses, despite being open to all, are generally delivered by female tutors with a bias towards women-related health issues such as weight-loss and osteoporosis (Formosa 2005). U3As, hence, continue to require men to relate to a culture that encourages them to cling to traditional roles and patterns of behaviour where it is believed that engaging in learning is for women rather than for men.

Other predicaments concerning the U<sub>3</sub>A include the movement's tendency to lack ethnic minorities and 'fourth agers' in its membership body. For instance, both Swindell (1999) and Findsen (2005) point out that given the multi-cultural environment of Australia and New Zealand, one would reasonably expect to see at least some Asian faces plus those of Maori and Pasifika people. This is, however, not the case and memberships of Australasian U<sub>3</sub>As are heavily represented by members from the Anglo-Saxon community. Findsen concludes that the exclusion of minority groups may not be deliberate, but as the projected ethos of U<sub>3</sub>As mirrors the values of the dominant groups in society, ethnic minorities feel that they do not have the necessary 'cultural capital' to participate in such learning ventures. At the same time, U<sub>3</sub>A membership bodies generally do not include older persons experiencing physical and cognitive difficulties. This is surprising considering that there are many older people (particularly among those aged *circa* 75 plus) facing mobility and mental challenges. Moreover, even at a relatively young age, often prior to statutory retirement, various older adults experience complications from strokes, diabetes and neurological diseases so that their functional mobility and intellectual resources become seriously limited. Indeed, a small percentage of older adults experience significant mobility and mental problems to the extent of becoming housebound or having to enter residential and nursing care homes. Even at a relatively young age, many older adults experience complications from strokes, diabetes and neurological diseases. Suffice to say that in Europe some 17 and 23 per cent of men and women aged over 65 experience some level of physical dependence (Economic Policy Committee and European Commission (ECFIN) 2006). The range of cognitive limitations experienced in later life is also substantial with, for instance, 9.95 million older adults suffering from some form of dementia in the same continent, a figure that should reach approximately 18.65 million by the year 2050 (Alzheimer Disease International 2010). Some 8 per cent of persons aged over 65 in the European Union resided in long-term care settings in 2004 (ECFIN 2006). Unfortunately, to date one locates no distinct efforts by the U<sub>3</sub>A movement to encompass the learning needs and interests of frail older adults in its aims and objectives.

Vellas (1997) and Laslett (1989) hoped that U<sub>3</sub>As would play a key role in the strengthening of intergenerational ties. However, most U<sub>3</sub>As continue to take the form of age-segregated educational programmes, with some not even allowing those who have yet to reach their 60th birthday to become members (Formosa 2000). This means that U<sub>3</sub>As are playing a limited role in the quest to ensure a society for all ages. Admittedly, third-age learning provides a greater degree of commonality and likelihood of peer support, as well as convenient daytime scheduling, length and frequency of courses,

semesters and affordable costs (Manheimer, Snodgrass and Moskow-McKenzie 1995). Drawbacks, however, include not responding well to the needs of frail or the oldest adults, being too small to provide differentiated and specialised course programmes, segregating older students from the rest of the population, a tendency to become ‘inferior universities’, and embodying low levels in the quality of educational experience and courses offered (Van der Veen 1990). Moreover, age-segregated sessions miss out on the various benefits that arise from the implementation of intergenerational learning. Thomas (2009) stresses the role of intergenerational learning in contributing to the policy areas of ‘community cohesion’ by breaking down barriers within communities, ‘community safety’ by mitigating stereotypes and providing positive role models, and ‘physical wellbeing’ by bringing different generations together to exchange skills and knowledge. With respect to older adults, intergenerational learning challenges the stereotypical images of older people so that it enables them to contribute to society in a meaningful way, and hence, creating an ‘age-friendly society’ where people are enabled to ‘live well in later life’ (Sánchez and Martínez 2007).

### **Renewing U3As: future roles, opportunities and directions**

As the U3A movement embarks on its fifth decade, it would be a mistake for programme managers to rest on their laurels. In doing so, the movement could risk meeting the same fate as those traditional leisure activities that were so popular with older persons in the past but which have since disappeared. The key challenge faced by U3As is to remain in tune and relevant to the life-world of present and incoming older cohorts. The U3A concept emerged in the early 1970s when the lifecourse was divided in three clear and distinct stages: childhood as a time for education, adulthood as a time to raise a family and work, and old age as a brief period characterised by withdrawal from work until frail health and eventually death. During this latter period the identity of older people existed within the context of the welfare state that embedded them in a culture of dependence through a compulsory pensioner status and near-compulsory entry to residential/nursing care (Townsend 2007). With the coming of late modernity the social fabric became more fluid in character, so that later life disengaged itself from traditional concepts of retirement to become increasingly complex, differentiated and experienced in a myriad of ways (Blaikie 1999). Nowadays, identities in later life take on a ‘reflexive organized endeavour’, operating on the basis of choice and flexibility, and finding their full expression in material consumption (Gilleard and Higgs 2000). However, it

seems that U<sub>3</sub>As remain locked in more traditional perceptions of late adulthood and somewhat oblivious to such transformations. James (2008) argues that centres have generally failed to keep pace with what older adults actually do in their lives, what they are really interested in learning tickles their fancy, and what motivates them to age actively, successfully and productively. She highlights how the U<sub>3</sub>A movement tends to be characterised by what Riley and Riley (1994) term as 'structural lag' – namely a failing on behalf of structural arrangements to meet or be relevant to the needs of a large proportion of its clientele. In Riley and Riley's words, 'structural lag' refers to

... the imbalance – or the mismatch – between the strengths and capacities of the mounting numbers of long-lived people and the lack of role opportunities in society to utilize and reward these strengths. This is the problem we call structural lag, because the age structure of social role opportunities has not kept pace with rapid changes in the ways people grow old. (1994: 15)

Similarly, Formosa (2012) points out that U<sub>3</sub>As generally overlook how incoming older cohorts are characterised by diverse generational dispositions when compared to those older adults that Vellas and Laslett had in mind when drafting the movement's principles and objectives. Undoubtedly, the past two decades have brought cultural changes that have altered the norms and values of contemporary older cohorts. Most salient among these changes include an improvement in their wealth, health and educational status, smaller family circles due to more older women having participated in labour markets, and an increasing readiness to combine part-time employment with leisure pursuits in retirement. The coupling of such transformations to other processes, most notably secularisation and individualisation, has been instrumental in urging third agers to create their own life biographies rather than remain shackled to traditional expectations towards daily living in 'old age'. In such circumstances, it is surely time for U<sub>3</sub>As to re-appraise their functions and purposes, and demonstrate that the movement remains a forward-thinking group which welcomes new ideas and new ways of practice. It would be extremely unfortunate if upcoming and present third agers feel the need to start new organisations simply because of their perception that U<sub>3</sub>As are no longer relevant to their lives. This section suggests four recommendations for the U<sub>3</sub>A movement to remain more in tune with the needs and interests of contemporary older adults.

### *Overcoming French–British polarities*

Contrary to what is generally assumed, studying for pleasure and towards a qualification are not necessarily incompatible, instead it may even be



complementary. After all, one frequently hears of third agers, emboldened by their U<sub>3</sub>A experience, starting a university course, and on the other hand, of older undergraduates taking a keen interest in or even becoming members of their local U<sub>3</sub>A. Rather than entrenching the U<sub>3</sub>A experience in an absolutist vision – advocating either strict autonomy or complete integration with traditional universities – U<sub>3</sub>As have much to gain from seeking partnerships with tertiary educational sectors working within a similar ethos. Whilst partnerships in older adult learning do not have to be formally constituted and grand affairs, the benefits of collaborative approaches include that ‘better information is available to help plan for learning, to deliver it in the best way, to promote engagement with it and to provide progression routes from it’ (Gladdish 2010: 26). One successful partnership between a traditional university and a U<sub>3</sub>A is found between the University of South Australia and the Whyalla U<sub>3</sub>A (Ellis 2009; Ellis and Leahy 2011). The central location and resources of the university provided rent-free premises which allowed their fees to be kept much lower than in other Australian U<sub>3</sub>As, and easy access for invited speakers and members. U<sub>3</sub>A members also enjoyed interacting with younger students and the help and encouragement that university staff extended to them. On the other hand, the benefits that the campus received from the U<sub>3</sub>A included the location of a pool of ‘clients’ for nursing and social work students, volunteer and administrative help on open days, whilst adding to the cultural and generational diversity present on campus. Another promising partnership constitutes the memorandum of understanding between The Third Age Trust and the Open University in Britain which recognises the complementary missions of both organisations, and which may lead to better opportunities for older learners, to improved access of library and online facilities, participation in university courses and modules, and registering as students with reduced fees and different entrance qualifications.

### *Quality of learning*

Research studies and rationales focusing on the third age movement affirm in an equivocal manner that learning holds positive benefits for its members. However, the precise contribution of learning in U<sub>3</sub>As to an empowerment agenda remains ambiguous. One must ask whether learners at U<sub>3</sub>A centres are too docile, too passive, as though listening alone were enough. This is certainly the case for U<sub>3</sub>As following the French model whose members are lectured by professors employed by the traditional university to which the centres belong. In its quest to improve the quality of life of the member body, the U<sub>3</sub>A movement needs to

seek a learning environment that is more dynamic in nature, one which facilitates

learners who are able to take control and direct learning; learners who are enabled to continue learning after a course has finished; learners who, in their daily lives, know how to put into practice learning they have undertaken; . . . and learners who develop strategies that enable them to know how to go about the business of learning. (Gladdish 2010: 15)

This is possible if learning environments at U3As drop traditional ‘top-down’ approaches in favour of a situation that places the teacher and learner in a dynamic relationship. Although teachers will always hold some level of authority over the learning session since it is their responsibility to create and sustain the right environment for learning to occur, older learners should have an opportunity to have a say in directing both the nature and content of the learning that takes place. Following Gladdish (2010), successful learning in later life relies on consideration and consensus to drive activity, which involves negotiation, advocacy, intervention, promotion and sometimes compromise. In short, ‘it is about creating something new with, as well as on behalf of, others’ (2010: 10).

### *Quality of instruction*

The quality of instruction needs also to be put under scrutiny as it is important that older learners do not fall back on the educational experience of their youth. Top-down approaches to educational instruction are to be avoided. Instead, course tutors should enable older adults to foster the control that they may be consciously or unconsciously lacking through encouragement to take responsibility for their learning by choosing those methods and resources by which they want to learn. A useful strategy here is to emphasise the importance of personal goal setting at the beginning of the course schedule and encourage it through activities such as making a personal statement of what the learners want to achieve. Facilitating learning in later life thrives on collaboration and partnership, and is characterised by ‘co-operative work’ between tutors and learners (Gladdish 2010). Tutors are also encouraged to draw on the life experiences of learners by allowing them to share examples of their experiences with the class and encouraging them to think about how those examples relate to class information. Course material that is presented in a way that reflects the ‘real world’, rather than some abstract component, is very popular with older learners. It is important for facilitators to synchronise themselves with the lifecourse experience of learners, born around World War II, and who lived their teenage and early adult years in the 1950s and 1960s. Nevertheless, U3As must not assume that older learners continue living in some bygone world. Rather, e-learning has

become increasingly popular in later life as it offers the opportunity for older learners to access information and communicate with others when and if they want to. For U<sub>3</sub>As to continue being relevant to contemporary elders, centres must make more effort to embed their learning strategies in the Web 2.0 revolution that now provides extremely user-friendly applications. Contrary to its predecessor, Web 2.0 uses interactive tools – ranging from Blogs, Wikis, Podcasts, online journals to virtual picture databases – to offer limitless possibilities for an interactive, empowering and participatory form of older adult learning.

### *Quality of curricula*

The relevance of taught content warrants careful attention since it tends to influence the extent that older persons are attracted to and benefit from the learning experience. The curriculum at U<sub>3</sub>As should be as bold and original as possible, negotiated with, and even determined, by the most vital interests of learners. However, this does not mean that U<sub>3</sub>A centres do not have any part to play in the choice of subjects. As Gladdish (2010: 36) affirms, ‘learning providers must be part of the debate that identifies appropriate curricula for older people, and they need to exercise professional judgement and integrity about their ability or otherwise to contribute to development and delivery’. More specifically, there is a real urgency for U<sub>3</sub>As to include non-liberal and health-related areas of learning such as financial literacy and care-giving, but especially, scientific courses that introduce learners to environmental, botanical and zoological studies. Since the correlation between later life and illiteracy is well-known, U<sub>3</sub>As could do well to set up literacy courses for older persons, a move that could help in mitigating the oft-mentioned charge of elitism. Moreover, the introduction of new areas of study may function for U<sub>3</sub>As to become successful in attracting non-typical learners such as older men (*e.g.* gardening, toy modelling, astronomy) and ethnic minorities (*e.g.* martial arts, origami, tai-chi). U<sub>3</sub>As must also co-ordinate intergenerational learning sessions that include curricula catering for learners from the whole of the lifecourse, and hence, linking third agers with children, teenagers, adults and even older peers. Specific activities may include book clubs, community work, film screenings, drama, as well as adoptive grandparent–grandchild relations. U<sub>3</sub>As would also do well to adopt curricula that operate on the principles of situated learning. A promising avenue in this respect is environmental volunteering where U<sub>3</sub>A could link up with eco-friendly organisations that provide both learning opportunities and possibilities for green volunteering. Older people possess a maturity of judgement, and therefore, are highly apt to highlight the imperative need to create a sustainable society and conserve natural resources.

### *Universities of the Fourth Age*

For the U<sub>3</sub>A movement to be a really valid exemplar of late-life learning, its activities must also branch out to older people who experience health difficulties. In this respect, there is a need for U<sub>3</sub>As to develop Universities of the Fourth Age (U<sub>4</sub>A) which would invest in more and better learning opportunities to people whose physical and cognitive limitations lead them to either become housebound or enter residential/nursing homes. On one hand, strategies may include providing adequate transport facilities to and back from the learning centre, having sessions taking place in learners' homes, transmitting sessions either online or on radio and/or television programmes, co-ordinating mobile libraries, and ensuring that course material is issued in 'clear/large print'. On the other hand, U<sub>3</sub>As are encouraged to promote the value of learning in residential and nursing homes as a tool for improving wellbeing, and augmenting a more positive outlook on life. U<sub>3</sub>As may provide volunteers to work in homes to facilitate or run discussion groups, reading societies, social/cultural outings, as well as perhaps develop an in-house magazine. Another possible activity which U<sub>3</sub>As may help to co-ordinate is a 'life-history project' where residents record their past, the present, and most importantly, the future in terms of unfulfilled ambitions, dreams and aspirations, which they can present to their relatives, friends and case workers. The running of interest-groups – ranging on subjects as diverse as choirs, horticulture therapy, reflexology, keep fit and sports activities – is surely another area in which U<sub>3</sub>As can contribute and help.

### **Conclusion**

This paper began by tracing the origins and modern developments of the U<sub>3</sub>A movement. U<sub>3</sub>As vary in size and resources, and their development is inevitably uneven. However, all are united in their efforts to provide learning opportunities for older adults, as well as increasing the visibility of older generations whose presence and worth is easily undervalued and overlooked. U<sub>3</sub>As also remind governments and educational bodies of the actual meaning of the words 'lifelong learning', providing a niche for a category of citizens who are often left out in the cold as far as learning opportunities are concerned, as governments continue to cling to traditional models of education geared towards production, profitability and employability. However, this paper has also brought forward the difficulties that the U<sub>3</sub>A movement is currently experiencing, and the possible and actual biases that centres may experience. One cannot let the successes of the U<sub>3</sub>A movement overshadow the fact that the movement caters little for older

men, those from ethnic minorities, and others experiencing physical and cognitive difficulties. To help overcome such lacunae, this paper also provides a number of suggestions for the future role for U3As, ranging from embracing a broader vision of learning, improving the quality of learning, instruction and curricula, as well as a wider participation agenda that attracts older persons experiencing physical and cognitive challenges. Of course, such proposals require a certain amount of human resources and monetary capital to take off. Whilst it is hoped that U3As are successful in attracting more volunteers to their fold, another possible strategy is to turn such projects into formal ventures and apply for funds from public enterprises whose ethos is to improve the physical, social and psychological wellbeing of older people. It is noteworthy that both the United Nations' *Madrid International Action Plan of Action on Ageing* (2002) and the European Union's policy documents on lifelong learning (European Commission 2006, 2007) include a strong emphasis on the need to improve opportunities for learning in later life. Moreover, the fact that the European Union co-ordinates the Grundtvig Programme which so far has provided funding to many a third-age learning project, and that 2012 has been designated as the European Year for Active Ageing and Solidarity Between Generations, should augur well for the successful lobbying for political, intellectual and financial backing.

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### NOTE

- 1 The USA is a notable exception in this regard since older adult learning boasts a rich tradition in this country. As early as 1950, the National Conference on Aging emphasised the potential of education for older people to assist and improve continued employment, health and nutrition, and familial relationships. Moreover, the energy devoted to pre-retirement education during the post-war years remains exceptional, with a 1952 survey of the 113 largest corporations in the USA showing that nearly 40 per cent had some kind of pre-retirement programme in operation (Manheimer 2007).

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