# Going Forward

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THE THIRD AGE TRUST

U3A

THE UNIVERSITY OF THE THIRD AGE

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# U3A

**THE UNIVERSITY OF THE THIRD AGE**

# Contents

# Vision and Mission Statement

## Our Vision

Our Vision is to make lifelong learning, through the experience of U3A, a reality for all third agers.

## Our Mission

Our Mission declares our purpose as an organisation and serves as the standard against which we weigh our actions and decisions. It is to:

- Facilitate the growth of the U3A movement.

- Provide support for management and learning in U3As.

- Raise the profile of the U3A movement.

- Promote the benefits of learning in later life through self-help learning.

## The Principles of the U3A Movement

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.

# U3A Chairmen Consultation Survey Results

## The Survey

To help the NEC in developing the Three Year Plan, a consultation survey was carried out among chairmen of all U3As in May and June of 2014. A questionnaire was devised with the help of a U3A member whose career had been in opinion research; that questionnaire was approved by the May NEC meeting and despatched by post to all 926 chairmen. Pre-paid envelopes were provided for direct return of the questionnaires to the research firm Ipsos MORI, ensuring confidentiality and allowing professional processing of the data.

By the deadline of 30 June, 427 completed questionnaires had been returned, a response rate of 46%. Postal surveys typically attract response rates of 10-20%, rising to 30-40% where there is stronger incentive to participate. The 46% response rate is, therefore, excellent, and can be considered to give a representative picture of opinion among U3A chairmen. This is further reinforced by the uniformity of response across the country: apart from slightly lower rates in Wales and Northern Ireland, response in all other regions lies between 40% and 55%.

Appended to these notes is the questionnaire marked up with main results. The survey comprised a mix of structured questions with given answer categories and open-ended questions which chairmen answered in their own words. Answers to the open-ended questions have been analysed by theme, with the major themes reported; given that respondents could say several things (or none), the answers to these questions will often sum to more (or less) than 100%.

## The Results

It is clear that the social and companionship aspects of U3A life are of huge value to members, as well as the opportunities for learning. Whether in the context of local U3As or the movement as a whole (Q1/Q3), the most commonly highlighted 'best thing' about U3A is the friendship and fellowship it inspires. Some typical answers:

*"After retirement, U3A helps to forge a new life for the individual and stimulates new beginnings for the way ahead"*

*"It enables the making of new friends, learning new skills, and sharing skills in a friendly, enthusiastic environment"*

*"The opportunity to meet new people and join with others still enthused about life and new ideas"*

The perceived challenges for local U3As (Q2) revolve around maintaining vibrancy and participation, including the recruitment of new committee members and Study Group leaders. For the wider movement (Q4), major challenges are seen to lie in broadening membership, raising awareness and maintaining growth.

The Trust is recognised to provide a range of benefits (Q5); those most valued include advice & guidance, educational support and insurance. Relatively few can think of additional services they would like (Q6), although extended use of technology is repeatedly mentioned, as are marketing/publicity materials.

Almost three quarters belong to local grouping of U3As (Q7-8). The biggest benefit is seen to lie in the sharing of information, experience and solutions to the common challenges facing U3As.

Giving support and advice is the function most valued in Regional Trustees (Q9). They are also seen as an important link between the national centre and local U3As. However, almost one in five chairmen took the opportunity to say that they don't know who their Trustee is.

*Third Age Matters* is particularly valued by U3A chairmen (Q10). The vast majority find it useful, including 37% 'very'. *Sources*, the national website and National Office mailings are also rated useful by three quarters or more.

The National Office is widely used and highly rated (Q12-13). Some 85% of chairmen have contacted it; of those, almost two thirds say the response was very helpful and most others that it was fairly helpful.

Membership growth is problematic for around half of U3As (Q15-16); by a factor of 4:1, the challenge is one of rising demand rather than low demand. Advice has been sought from a range of sources including the Trust, the national website, Regional Trustees and, especially, local Networks.

Opinion is divided on the role of the Trust in setting up new U3As (Q17). Most commonly, chairmen are looking to the Trust to provide information and guidance, especially on the formalities. A significant minority, though, think the Trust should be directly providing the resources to set up new U3As.

The final question invited other comments, which are miscellaneous. A couple of examples:

*"I wonder if management training should be developed for chairmen of U3As with more than 300 members"*

*"Glad to see that the Trust is joining the 21st century and catching up with other organisations in having a Three Year Plan"*

# U3A Chairmen Consultation Survey

## Section 1: Benefits and Challenges

### Q1. What would you say are the best things about your U3A?

| | |
|---|---|
| Friendship/companionship/support | 71% |
| Range of interest groups/activities | 59% |
| Social interaction/contact with people | 40% |
| Opportunity for continuous learning | 33% |

### Q2. And what are your U3A's key challenges?

| | |
|---|---|
| Keeping the U3A vibrant/participative | 47% |
| Getting new committee members | 45% |
| Getting new Study Group leaders | 45% |
| Meeting demand for Study Groups | 24% |

### Q3. What would you say are the best things about the U3A movement?

| | |
|---|---|
| Opportunity for social contact/new friends | 54% |
| Gives people new interests/lease on life | 38% |
| Opportunity for continued learning | 33% |
| Learning for fun/ethos of shared learning | 27% |

### Q4. And what are the key challenges for the U3A movement?

| | |
|---|---|
| Inclusivity/attracting a wider range of members | 26% |
| Raising public awareness of U3A | 25% |
| Maintaining growth | 23% |
| Encouraging younger members | 15% |

## Section 2: Role of the National Body/ Regions/Networks

### Q5. What would you say are the three most important benefits provided by the Third Age Trust?

| | |
|---|---|
| Help/advice/guidance | 58% |
| Educational support/Resource Centre | 42% |
| Insurance | 35% |
| Info packs/Advice Sheets | 23% |

### Q6. What additional help would you like to see the Third Age Trust providing?

| | |
|---|---|
| More help for established U3As | 10% |
| Increased use of technology | 9% |
| More marketing/publicity materials | 8% |
| Financial support for projects/equipment | 7% |

### Q7. Is your U3A involved in a local grouping of U3As?

| | |
|---|---|
| Yes | 72% |
| No | 28% |

(if yes answer Q8; if no go to Q9)

### Q8. What do you most value from your involvement in that local grouping of U3As?

| | |
|---|---|
| Sharing/exchange of ideas | 59% |
| Sharing challenges/solutions | 40% |
| Opportunity to learn about other Networks | 30% |
| Opportunity to share trips etc. | 25% |

### Q9. What would you say is the most valuable role of your Regional Trustee?

| | |
|---|---|
| Provides support/help/advice | 29% |
| Link between NEC/Headquarters and U3As | 22% |
| Helps communication between U3As | 15% |
| Not aware we have one/don't know who it is | 18% |

## Section 3: Publications and Services

### Q10. How useful do you find each of the following?

(Please tick one box for each factor)

| | Very useful | Fairly useful | Not very useful | Not at all useful | No opinion |
|---|---|---|---|---|---|
| *Third Age Matters* | 37% | 46% | 11% | 4% | 2% |
| *Sources* | 28% | 48% | 13% | 3% | 8% |
| *The national website* | 27% | 52% | 12% | 4% | 5% |
| *National Office mailings* | 26% | 50% | 15% | 3% | 6% |

### Q11. Have you used any of the Advice Sheets or Discussion Documents produced by National Office?

| | |
|---|---|
| Yes | 79% |
| No | 21% |

**Q12. Have you contacted the National Office with queries?**

| | |
|---|---|
| Yes | 85% |
| No | 15% |

**Q13. IF YES: How helpful did you find the response?**

(Base: those who have contacted)

| | |
|---|---|
| Very | 63% |
| Fairly | 25% |
| Not very | 8% |
| Not at all | 2% |
| Don't know | 2% |

**Q14. Have you ever attended the national AGM/Conference?**

| | |
|---|---|
| Yes | 30% |
| No | 70% |

**Q15. Is membership growth a problem in your U3A?**

| | |
|---|---|
| Yes – increasing growth | 37% |
| Yes – decreasing growth | 9% |

(If yes (either category) to Q15, answer Q16a and b. If no, go to Q17)

**Q16a. From which of the following, if any, have you sought advice on this issue?**

(Base: those who have experienced growth problems)

| | |
|---|---|
| National Office/Third Age Trust | 28% |
| National website | 25% |
| Regional Trustee | 23% |
| Local grouping of U3As | 37% |
| Other (specify) | 8% |

**Q16b. Did you find any of the advice helpful?**

| | |
|---|---|
| Yes | 55% |
| No | 10% |

**Q17. What role do you see the Third Age Trust has in starting up new U3As?**

| | |
|---|---|
| Advisory/providing information | 46% |
| Guidance on formalities/procedures | 34% |
| Giving support/encouragement | 32% |
| Providing people/resources to start U3As | 27% |

**Finally, a couple of questions about your own U3A.**

**Q18. How long has your U3A existed? (tick one box)**

| | |
|---|---|
| 0-5 years | 22% |
| 6-10 years | 19% |
| 11-20 years | 30% |
| More than 20 years | 27% |

**Q19. How many members does your U3A currently have? (tick one box)**

| | |
|---|---|
| Under 300 | 54% |
| 300-600 | 30% |
| 601-1,000 | 10% |
| More than 1,000 | 6% |

**Q20. Do you have any other comments?**

(See notes)

**Main answers, based on 427 returns, June 2014**

# Three Year Plan

## 1    Management Summary

Over many years, the U3A movement has been impressive in its ability to grow, both in terms of the numbers of U3As (average 5 percent per annum) and in terms of its membership. This shows little sign of abating and, indeed, the growth could be even greater as there is a huge potential for new members throughout the UK.

With growth comes the challenge of maintaining quality, maintaining the commitment of our volunteers and maintaining the self-help ethos of learning that has been fundamental to our success.

Consequently, the National Executive Committee (NEC), in formulating this plan, has considered what needs to be done, not only to cope with growth, but also to manage it effectively for the benefit of all our members. In doing this, we have given due thought to the key areas of member support, the changing nature of our membership — newer members may have different backgrounds, ideals and values from our early founders — and the onward march of technology which will not slow down. We all need to understand the impact of these changes.

Actions we will be taking, therefore, include high quality, consistent training. Many queries arise from the fact that as U3A committees evolve and new members join there can be, over time, a gradual erosion of understanding. The better informed the U3A, the better they will be able to take speedy action and make decisions to benefit the membership. However, focusing on individual U3As would be time-consuming so we will actively encourage them to join their local network or a small grouping of U3As so that we can help more people more quickly. This does not mean ignoring individual U3As — far from it. However, the logic of talking to more people at the same time is inescapable in terms of gaining common understanding and encouraging local U3As to build even stronger links between each other.

We also need to develop a greater understanding of the changing nature of our membership base. To do this, we will encourage the sharing of information so that more people will be aware of any new interests being introduced. This further encourages dialogue and ideas can be taken into our U3As to maintain our attractiveness and show to the outside world what we already know: that we offer a wonderful experience of learning and friendship, and an environment where we can keep in touch with each other. With the continuing reduction of funded adult learning opportunities and the breakdown of families due to greater mobility, our movement will become even more important in the future.

As far as technology is concerned, we all know that it is not going to go away. However, harnessed properly, it is a force for good. We will help our members get to grips with how technology can be used for learning, sharing and efficiency; a new IT committee is to be set up for this purpose. Those U3As which are growing quickly deserve a forum where they can exchange ideas and make recommendations to The Third Age Trust.

We have also decided to revive one of the basic tenets of our movement and reinstate our Research committee.

This sharper all-round focus will be reflected in our website, our communications and our commitment to continually improve our services whilst preparing ourselves for a challenging but vibrant future.

## 2    Introduction

### 2.1    BACKGROUND

U3As and the Third Age Trust have been wonderfully successful in developing, spreading and delivering the philosophy of self-help learning.

Our position in the adult learning sector is unique and our approach has resulted in tangible benefits to individuals and their communities. Continued reduction in funded adult learning and the increasing fragmentation of families and society, mean that the U3A movement will become even more important in the future. The enrichment of people's lives and our contribution to an individual's sense of purpose and achievement are important factors that help to combat loneliness and contribute to their wellbeing.

Given the increasing importance of our role, we have reinforced our vision for the future which is:

**To make lifelong learning, through the experience of U3A, a reality for all third agers.**

Delivering this vision will be challenging but immensely rewarding. The scope is great: we currently reach less than 3 percent of the third age population.

From an external point of view, the U3A 'market' is generally seen as predominantly white and middle class. Indeed, many outsiders have the view that we are an elitist organisation — and in their minds, perception is reality.

To date, our annual growth is typically 5 percent for new U3As and 7 percent for overall membership. Whilst impressive, this growth has been mainly organic, much of which has depended on the energies of enthusiasts. However, these figures mask major variations and include areas where U3A membership is shrinking.

To achieve our vision, we require a deeper understanding of:

- The needs of newer, younger members.

- How we can broaden our market and embrace diversity. One report states that 'the movement caters little for older men, those from ethnic minorities, and others experiencing physical and cognitive difficulties.'[1]

- The impact of technological changes.

- The impact of new channels of learning such as massive open online courses (MOOCs) and other such initiatives.

- Ways to ease the ever-increasing workload of our volunteers at all levels.

- How to position ourselves and embrace appropriate levels of PR and marketing.

However, we must never take our eyes off the fact that:

- We need to continue to cherish and nurture all members regardless of age and capability.

- We should be aware of the health of existing U3As. This is an area for further examination as the reasons for vibrancy or decline are not deeply understood or discussed.

This then, provides the backdrop to our Three Year Plan: a future that can be approached with pride in our past.

## 2.2 ASSUMPTIONS AND CONTEXT

Current levels of growth and associated demands have resulted in:

- An uneven adherence to our core principles. These will be continually restated and underpinned by all channels of communication.

- An impressive array of services to U3A members. These will continue to be reviewed and added to where needed.

- An imbalance of workloads in various Regions. We will resolve this through improved structures and the appointment and training of extra volunteers.

- Pressure on individuals and on the National Office in general. This could be symptomatic of:

  ⇨ The natural consequences of growth.

  ⇨ Inconsistent approaches to training, standards and knowledge levels in some U3As.

  ⇨ Inadequate support structures in the Regions.

As we pursue our vision, pressure on all resources will inevitably be exacerbated.

The NEC will continue to oversee:

- Prudent use of finances.

- The professional management of risks and actions for their mitigation. These need to take into account changes in rate of growth.

- The development of a succession plan for the National Office.

- The efficient management and interaction of sub-committees.

- Any potential changes to overall governance.

Whilst the above aspects are the core business of the NEC, they require actions, some of which are urgent. With the future in mind, we will:

- Research the needs of an ever-increasingly diverse membership. Results will be shared with Regions, Networks and U3As so that new areas of learning activities can be understood and disseminated. This should be accompanied by relevant presentation materials, guidelines and other resources.

- Research trends in technology and help our members understand how it can be used for learning, sharing and efficiency.

- Develop relationships with mutually supportive external bodies. Appropriate partnerships could develop as long as there is no compromise to the U3A ideal of self-help learning.

- Develop all communication channels so that we can deliver clear, unambiguous messages to our chosen audiences. This will require us to identify and agree the sectors we wish to reach (internal and external to the U3A movement), then develop focused messages to these sectors, all based upon a common set of core materials.

- Determine how we can help Regions, Networks, and U3As cope with the administration of burgeoning membership. Many procedures in current usage are, technologically speaking, out-of-date and rely on inefficient systems and scarce resources for their continuing usage.

## 3 Priorities and Actions

### 3.1 MISSION STATEMENT

For ease of categorisation, the actions associated with the preceding broad-brush statements have been placed under the relevant headings of our Mission Statement.

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1 Marvin Formosa, 'Four Decades of Universities of the Third Age', (2012)

These 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.

## 3.2 TO FACILITATE GROWTH OF THE MOVEMENT

This section considers growth not only in terms of the usual parameters of new U3As and the number of members, but also in terms of the development and revitalising of Regions, Networks and existing U3As.

To facilitate growth we need to:

- Have a clear understanding of those geographical areas that need new U3As and of reasons for any lack of growth.

- Create an environment where people want to join a U3A.

- Have effective Networks and sessions on keeping U3As vital.

- Have the structure and procedures to manage growth nationally.

- Have the capacity to manage growth locally.

- Make communications easy and effective.

### 3.2.1 Generating understanding

The most obvious way to facilitate growth of the movement is to develop new U3As. Whilst a look on a map can generate a superficial view of where we have empty spaces, this is inadequate due to the over-arching need for local knowledge. Consequently, the task of determining where to target potential new U3As should be undertaken on a Regional basis, taking into account each Region's priorities in order to get the right mix of new U3As.

**Action 1:** Regional Trustees to generate a brief summary of their approach to the development of their Region's U3As and Networks. This plan should provide:

- The reasoning behind the approach.

- The resource implications within the Region.

- The resource implications nationally such as training and workshops.

### 3.2.2 Creating the environment

Many people think of U3A as a 'best kept secret'. Others, who know of us but not about us, think that we border on being elitist. Section 3.4 discusses raising our profile whilst Section 3.5 discusses the benefits of belonging. In addition, we need to reinforce some of the basics — these are covered in Section 3.3.

Each of these sections promotes the generation of pragmatic and specific activities which in their totality will result in improvements. However, we must also create an atmosphere within Regions, Networks and U3As that stimulates and maintains enthusiasm. This is an essential part of encouraging volunteers and encouraging potential members to join.

### 3.2.3 Managing growth: national considerations

We have seen that the current rate of organic growth has created too high a workload for some individuals. In achieving our vision, this situation will not abate unless we take immediate action.

**Assistance to the Trustee**

Various models for the Regions have been suggested and there is unanimous support for the fact that 'something has to be done'. However, due to the disparity in the Regions, agreement on a single solution is unlikely and trying to adopt one will not work and could cause delay. At present, as all members are unpaid volunteers and consequently without pay grades or careers to manage, we can be quite flexible whilst also developing common procedures.

Common procedures are important so that there is a uniform understanding and a common delivery of messages across the UK. However, specific roles and duties within these procedures can be undertaken by a single person or shared by many, depending upon the size or complexity of a region. For example:

- Region 1

  ⇨ Trustee:
  Develop and maintain the Region.

  ⇨ Appropriate number of Regional Volunteers:
  Set up or help set up new U3As.
  Assist with planning Regional tasks.

- Region 2

  ⇨ Trustee.

  ⇨ Assistant to the Trustee:
  Share the workload as defined by the Trustee.

  ⇨ Appropriate number of Regional Volunteers.

- Region 3

  ⇨ Trustee.

  ⇨ Assistants to the Trustee:
  Share the workload as defined by the Trustee but with differentiated roles: one responsible for new U3As, the other concentrating on development, maintenance and organising Network events.

  ⇨ Appropriate number of Regional Volunteers.

**Action 2:** With immediate effect, give Regional Trustees the authority and latitude to appoint volunteers and organise them as appropriate for that Region.

## New U3A training

With a hoped-for increase in the number of Regional Volunteers, all training needs to be more effective and must be capable of being delivered by more people. As a result, all training materials need to be reviewed and amended so that they are more comprehensive, delivered with a U3A house style and accompanied by an effective set of handouts that can be referred to post-training. These handouts should be detailed and collated into a single loose-leaf folder. The training materials should be accompanied with recommendations regarding the experience required at the different stages of developing a U3A.

**Action 3:** As a priority, review, amend and publish a comprehensive set of training materials relating to the setting up of new U3As. Mandate that only these materials should be used across all of the UK.

## Sub-committee structures

The present NEC Committee structure has been weakened as a result of:

- Turnover/periods of office of Trustees.

- Insufficient time for progress.

- Inadequate terms of reference causing delays in getting new members up to speed.

All of these and an absence of an over-arching plan also contribute to changes in priorities and lack of sustainable progress. There are, inevitably, calls for new roles, new permanent positions and a change in governance.

When reviewing the Committees, due prominence needs to be given to areas where there is likely to be growth, such as technology, or areas where focus has been diminished (research, for example). It must be clear into which committee various activities report.

Consequently, there is an urgent need to review the roles of the Committees and define responsibilities. These

Committees need extra support in terms of people able and willing to perform the work. Whilst the election of Trustees results in a variety of skills and backgrounds, members with relevant expertise can be invited to join a Committee.

**Action 4:** As a priority, review current Committees in terms of:

- Their joint capability to manage the Trust's portfolio of activities: making sure that each major activity has a logical home and that the activity is managed properly.

- Whether each Committee has appropriate and clear authority over these activities.

- Ensuring that the Committee can call upon appropriate resources to fulfil their obligations.

- Determining how each Committee can manage itself, through, for example, face-to-face discussions or Skype. Whilst these are available at present, extended Committee membership would need to make use of many channels for discussion. These should be defined and implemented.

## National Office

The National Office provides an invaluable service to every section of the U3A movement. Inevitably, any growth has an impact, but accelerated growth could prove difficult to manage. To safeguard the future, we need to:

- Critically examine activities. Demands made on the National Office need to be understood so that trends for support can also be understood and actions taken in advance. These trends need to be made public so that a greater understanding can be reached by all Trustees who, in turn, may consider organising local seminars or courses to cover frequently asked questions.

- Increase the use of the website. Good progress has been made but is being hindered by the workload on Trustees. Providing support to Trustees and Committees as already defined should resolve this situation. The website should continue its progress towards more interaction and a source for information such as ideas for best practice and presentations that could be shared across the UK.

- Further exploit technology. Whilst email is used as a means of general communication, it is not always used sufficiently to pass on information such as that received by U3A Business Secretaries. An examination of standard communication should reveal other areas that could be automated.

- Develop a network of experts who can assist with explaining and assisting in areas where specialism

is required, the most obvious example being that of trends in technology. These will not abate and demands for advice will increase.

- Develop a formal succession plan. Whilst there is an obvious and urgent need to determine the roles of the SEO/Company Secretary's successor, other roles should similarly be considered as there is often a turnover of staff following changes at a senior level.

**Action 5:** Determine where future demand will be placed on the National Office.

**Action 6:** Review and improve the use of technology such as email, the website and cloud computing (see also 3.2.5).

**Action 7:** Develop a network of experts. This could be done in parallel with the consideration of Committee structures.

**Action 8:** As a priority, develop a succession plan for the National Office. This should take into account the efficacy of the Committees and any extra perceived need for new roles.

### 3.2.4 Managing growth: local considerations

Issues relating to managing growth at local U3A level tend to be at the two extremes: dwindling membership and rapid growth. In terms of the former, these U3As need to be identified and Trustees should seek to determine the reason and assist with whatever help may be required. Sometimes, help is not sought or thought not to be required due to factors internal to that U3A. The actions discussed in Section 3.3, which cover management, are designed to help such cases.

Where growth is rapid, challenges can involve some of the following:

- Finding more activity groups and volunteers to keep up with the demand for learning.

- Coping with increased administration. As we become more successful, this will become more of a problem. Many U3As are coping with basic spreadsheets set up some time ago; typically using such tools as Excel, Access or Lotus. Many of these are out-of-date or unsupported by the original software supplier. Also, there may be succession problems as those who wrote the original systems may no longer be available to lend whatever support may be necessary. There is a perceptible demand for new systems, and requests for central help and support are becoming more frequent.

- Other areas of technology also require consideration. With increasing activities, websites need to be updated more often, communication needs to be improved and the use of email needs constant encouragement. Also, newer services such as cloud computing need to be more deeply understood so that committees can take appropriate action to exploit the advantages that these systems can offer.

**Action 9:** A project needs to be established to:

- Determine demand for membership management systems.

- Investigate initiatives already under way in some U3As to determine whether they would be suitable for further development to make them 'industrial strength'.

- Consider the development of a system that can be used by any U3A regardless of what local computers are in use; this would imply an Internet or browser-based solution.

This should be an action completed in the short term: in the next financial year.

**Action 10:** A new committee should be established to oversee all areas of technology so that timely guidelines can be issued, seminars developed and online queries answered. The committee should also take into account the development of social media: how it can spread the word and any implications regarding its usage.

### 3.2.5 Making communication easy and effective

In the context of facilitating growth, we need to be slicker at getting the right information out to the relevant people quickly and efficiently. The content of the information is dealt with in Section 3.3.

In terms of the 'how', as stated previously, continued emphasis must be placed on further development of the national website. A deeper understanding of what people request, for what purpose they request it and why they request it through any particular medium needs to be developed so that we can automate wherever it is productive and cost-effective.

Use of emails and links to our website should be increased.

An Advice Sheet on email should be developed to encourage U3As to adopt standard email addresses such as chairman@U3Alocaltown.org.uk. This would take quite some time to take effect due to the need to set up new domain names.

**Action 11:** Develop best practice guidelines for the use of email and for the use of websites; they are shop windows and need to be up-to-date, informative and attractive to non-members and members alike.

## 3.3 TO PROVIDE SUPPORT FOR MANAGEMENT AND LEARNING IN U3AS

### 3.3.1 Reinforcing the U3A ethos

With the growth of the movement and our commitment to operationally independent U3As it is, perhaps, not surprising that interpretations of how various U3As run their organisations can vary substantially. However, the underlying tenet of self-help, member-led learning is the foundation of our movement and the key source of member fulfilment and satisfaction. Consequently, we must take every opportunity to reinforce our core ideals. This is recognised and much positive work has already been done. However, as in any business that has such a disparity of size and local custom, we need to do more. This needs to happen at various levels:

- National: just as we need to raise our profile externally, we need to develop an approach to internal marketing. The logic is the same: categorise the segments that we want to address and develop messages accordingly.

- Regional: Regional Trustees should develop plans that are pertinent to their particular environments. This should include how underlying core messages should be put across.

- Network: Network chairmen and committees should be given a syllabus of courses and workshops from which they can choose modules that can be used to help reinvigorate U3As and inspire enthusiasm for our core principles. These need to be fun whilst developing real enthusiasm — just reading from a set list or speech would be insufficient.

- U3A committee: this is where local direction starts and where the scene is set for everything that happens within the U3A. Consequently, monthly mailings, guidelines, information sheets and any other correspondence need continually to reinforce the ethos (see Section 3.4.1).

- U3A member: in any large organisation, messages get 'stuck' or lost at each intervening layer. The vehicles for addressing this problem are:

  - *Third Age Matters.*

  - *Sources.*

  - Conferences.

  - Lectures and training events.

  - All guidelines, information sheets and booklets. (see Section 3.3.2).

  - Website.

  - Person-to-person communication.

Each of these channels must be used continuously to reinforce the importance of the U3A ethos. However, this must be done in a manner that suits the particular channel being used: conference slides are vastly different to printed narratives as found in *Third Age Matters*. Aspects of the core message can be used in different articles which, together and over a period of time, just act as reinforcements.

**Action 12:** Break down our core messages into constituent parts, describe those parts properly and use these as guidelines for inclusion in appropriate presentations, articles, conversations. Each can be interpreted according to the individual and the audience but the message must be the same. The constituent parts need not all be delivered at the same time.

**Action 13:** Develop a set of slides or modules that can be interspersed in conferences and courses. Allow people to pick and choose according to the particular event.

These, and other actions, are also covered in Section 3.4.1.

### 3.3.2 Guidelines, Information sheets and booklets

These all deliver huge benefits to members throughout the movement and must continue to provide up-to-the-minute advice and guidance. We should encourage feedback on each of these to ensure clarity.

**Action 14:** In conjunction with widening membership of committees, experts should be asked to contribute ideas on improvements to current practices and procedures.

**Action 15:** Encourage the sharing of best practice and encapsulate in regular bulletins. Emphasis should be placed on ideas that can be relatively easily repeated and ideas that reinforce the value of exploiting self-help learning.

Many training courses, workshops and seminars are being developed and implemented. A common approach should be made to describe these so that Regions, Networks and U3As know what is available.

**Action 16:** All events should be encapsulated into a single document or indexed webpage so that the description is accompanied by:

- Purpose.

- Benefits of attending.

- Any implications such as size of venue or use of facilitators.

- Frequency.

- Cost — who pays for what?

- Time considerations.

Regions should encourage Networks and U3As to understand what's on offer and hold or attend relevant events.

### 3.3.3 Keeping U3As Vibrant

There are already various documents that cover U3A vibrancy and associated topics such as waiting lists. These should be reviewed to make sure that they are still current and that they contain, wherever appropriate, aspects of our core messages that play an obvious role in keeping U3As fresh and stimulating.

These documents should be augmented by:

- New findings, such as the recent Merton U3A report on male membership[2]. Such a report could also be used to develop workshops.

- The promulgation of best practice. In particular, which activity groups work, and how they were set up. These ideas should be sent to the national website and made available via the same media. In addition, supplements could be included in mailings or *Sources* and could also become the basis for U3A and Network development events.

- Any findings that purport to describe the interests of newer members and different communities should also be made available.

**Action 17:** Devise, capture and publish workshops which can be used to stimulate ideas that can be built on by local U3As and their Networks.

**Action 18:** Regional Trustees and Networks to work together to identify U3As that are experiencing low or no growth. Work to offer some or all of the following:

- Best practice workshops.

- Ideas for new activity groups.

- Ideas for revitalising the Committee.

### 3.4 TO RAISE THE PROFILE OF THE U3A MOVEMENT

The most obvious way to promote the profile of the movement is by exploiting publicity. However, this begs the question, "What sort of publicity are we seeking?" The key to answering this question must be to keep closely to our core principles and be very clear about the message we are purveying.

Raising our profile also means widening our approach to developing external relationships and potential partnerships, but again with a very clear view of what our remit should be in such situations.

### 3.4.1 Defining Our Profile

We have agreed that:

- The whole range of current publicity materials should be edited to ensure it meets high editorial standards.

- The design of U3A materials must reflect the character of the organisation.

- When designing a publicity item, there must be a clear understanding of who it is aimed at and the message it is attempting to communicate.

- A slogan or strapline, which gives a clearer understanding of what the organisation is and what it does, is necessary.

In addition to these recommendations, we should also define our positioning with regard to external organisations. The more the size and nature of our organisation is understood, the more we will be asked to take part in various projects. When faced with such a situation, each member of the NEC should be in a position to give a very clear steer as to the types of activity in which the Trust or the movement as a whole should get involved. However, this should fall short of making definitive instant decisions as further discussion may well discover wider implications.

**Action 19:** Define a slogan or strapline that can be used in all materials, whether for physical, digital or presentational media.

**Action 20:** Define the Trust's position with regard to external bodies. These should include:

- Government (local and national).

- Learning Institutions such as universities and colleges.

- Learning organisations such as National Institute of Adult Continuing Education (NIACE).

- Other institutions such as Age Action Alliance.

- Ethnic organisations.

- Disability and single impairment organisations.

### 3.4.2 Publicity

It is unlikely that the U3A as a movement would get involved in any national advertising campaign. However, local visibility is different. Local events, such as setting up a new U3A, need to be quite vigorously publicised.

Included in the actions in Section 3.4.1, we should assess the strength of posters in conveying our message to potential U3A members.

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2        Catherine Ware, *Men and U3A*, (Merton U3A, 2013)

**Action 21:** Commence work on implementing the review of publicity materials.

**Action 22:** Develop templates that can be used for posters and presentational materials and, where applicable, ensure that advice and guidance is available on their usage.

### 3.4.3   Developing Relationships

Keeping within the principle of maintaining the integrity of the Trust, we should develop external relationships which have the potential to result in mutual benefit. Some of these relationships may be based upon spreading the word about each organisation, whilst others may result in more project-orientated collaborations.

At present, the Trust is not geared to head up a large-scale project. Such a project could be lengthy and complex and the management skills for such a collaboration are not currently part of our remit. We need to determine whether we wish this situation to remain the same.

However, there are many opportunities for us to build constructive and fruitful relationships:

- 50+ Shows are excellent vehicles for publicising the U3A, as are local learning festivals.

- Collaboration with some age-related charities could offer many opportunities.

- Governmental organisations can be highly beneficial in getting across the important messages of lifelong learning and the impact on wellbeing, combatting loneliness and so forth. In turn, we can be quoted in influential publications and gain access to local MPs and the like for such occasions as speeches or opening addresses.

- Universities can be particularly fruitful in supporting our main activities if U3As can have access to resources and free lectures from a faculty.

- Museums and galleries are rich sources for Shared Learning and Research Projects.

Looking slightly further ahead, online learning is set to become more widespread and more accessible as the computing skills of our membership improve in line with the profile of newer joiners. In particular, massive open online courses (MOOCs) will become obvious candidates for our members to research and exploit. This brings into question the issue of how we would like to move forward in such a scenario. We can:

- Continue to develop our own untutored online courses.

- Recommend to our members the use of MOOCs developed by institutions with whom we can develop partnership arrangements.

- Mix and match our own offerings with external courses.

Whichever approach we take, we must ensure that we give best advice to our membership on how they can take what are essentially individual activities and convert them into more apposite U3A approaches that keep social and group interactions intact. In line with this, we would need to monitor the progress and benefits of such developments.

**Action 23:** In conjunction with previous actions, construct guidelines as to how U3As could benefit from developing a wider, outward-looking approach to external bodies. Case studies and best practice examples could be published on our website and successes printed in *Third Age Matters*.

**Action 24:** Develop our policy with regard to the in-house development of untutored online courses, and the U3A approach to MOOCs and their exploitation.

### 3.4.4   Marketing and Public Relations

Other vehicles can be used to publicise the U3A movement. Many articles are now appearing on the benefits of keeping the brain active and the importance of lifelong learning in general. However, our name is rarely seen in such articles and we do not seem to be considered when asking for opinions on such topics. We should prepare approved templates of our positions on topics with which we wish to be associated and these should be sent to editors and news channels as soon as one of our favoured topics is current.

This brings into question the issue of any subsequent spokesman that may be required. Ideally, this should be either the Chairman or a Vice Chairman; the titles define seniority and are more likely to receive attention.

**Action 25:** Prepare templates and 'messages to the editor' for agreed topics and ensure that these become active means of communicating with the media.

**Action 26:** Guidance on dealing with the media should be given to U3As so that they are aware of what they can do locally: publicise events such as Open Days or local topical events. Where national media is concerned, they should consult the National Office for guidance.

Other opportunities for marketing U3A need to be considered:

- We should develop a policy on national public visibility such as that engendered by our Founders' Lecture. This should include events managed by ourselves as well as occasional co-sponsorship or visible presence at prestigious learning events. Due regard to the amount of funding would need to be considered.

- We should encourage more intergenerational

work.

- Whilst we are not a lobbying body, there are occasions when we could genuinely represent our 340,000 members in national topics such as the fact that lack of broadband inhibits learning.

### 3.4.5 Internal Marketing

Whilst we need to increase our profile externally, we also need to market ourselves internally. However, we would need to consider the market segments differently. If we want to sell a progressive message, we need to market that message more strongly to the enthusiasts. Similarly, we need to focus on effective and targeted channels of communication such as our Networks in a manner that is deliberate and focused.

We must determine a few key areas that need action across all U3As.

**Action 27:** Identify those sections of U3A that are seen by their peers as examples of good practice and ensure that they are encouraged to pass on important ideas for action.

### 3.4.6 Social Media

In addition to our website, we could usefully exploit social media. We already have a Twitter account but, at present, its use is limited. Current experience would seem to indicate that it is not a preferred source of communication for U3A members.

On the other hand, the usage of both Facebook and YouTube is increasing. We are starting to be asked for advice about the benefits and issues of using such services, along with the understandable concerns about privacy and the fact that the current membership profile may not actively view any of these facilities.

**Action 28:** Guidelines should be written that outline the benefits of and the issues surrounding social media.

### 3.5 TO PROMOTE THE BENEFITS OF LEARNING IN LATER LIFE THROUGH SELF-HELP LEARNING

U3A members readily understand the benefits of lifelong learning. Many external reports emphasise the importance to wellbeing and there are increasing instances where research is being undertaken.

The U3A movement should clearly have a voice in ensuing debates.

One of the recommendations in this plan is that we share best practice across the Regions. We should also share instances of research, news articles and anecdotal evidence. If we are to promote the benefits, we need to be able to quote from external sources as well as from our internal experiences.

We need to augment the 'learning' message with other information salient to ourselves:

- The loss of adult learning facilities is leaving large holes that we can fill with the additional benefit of the satisfaction that self-help learning, as implemented by U3A, brings.

- The Office of National Statistics stated that social contacts are part of a person's support system, and that feeling part of a community was key to happiness.

- With the increasing mobility of families, U3As offer more connections into local communities.

Again, we should consider how these messages are put across.

The benefits of the U3A model are very widespread.

**Action 29:** Reinstate the Research committee and determine ways of bringing relevant results to both internal and external audiences. The committee should have a wide-ranging brief that encourages all types of research, from academic work leading to formal publication to focused study for the benefit of the local community or the U3A.

## 4 Summary

The main messages from The Third Age Trust's Three Year Plan are that we need to:

- Continually reinforce the core principles of the U3A movement.

- Manage areas of growth which put a heavy burden on all involved.

- Get to grips with the future of technology in terms of likely impact on all U3As.

- Encourage U3As to belong to local networks or small groupings and provide appropriate advice and support.

- Be consistent with regard to all promotional publicity and training materials.

The actions in this plan are geared to ensuring that we tackle all of these areas. They are manageable and, taken in their entirety, can resolve most of the issues that we face today.

Throughout the plan, the overriding priority has been to consider each action in terms of the end benefits to U3As and U3A members. We firmly believe that being true to our values has been fundamental to our success and that their reaffirmation is for the long-term good of the U3A movement as a whole.

# Appendices

## Appendix 1: Summary of Actions

| | Action | Plan Ref. | Priorities / Owners |
|---|---|---|---|
| **1** | Regional Trustees to generate a brief summary of their approach to the development of their Region's U3As and Networks. This plan should provide:<br>■ Reasoning behind the approach.<br>■ Resource implications within the Region.<br>■ Resource implications nationally such as training and workshops. | 3.2.1 | High priority. Actioned. |
| **2** | With immediate effect, give Regional Trustees the authority and latitude to appoint volunteers and organise them as appropriate for that Region. | 3.2.3 | High priority. Actioned. |
| **3** | Review, amend and publish a comprehensive set of training materials relating to the setting up of new U3As. Mandate that only these materials should be used across the UK. | 3.2.3 | High priority. Responsibility: Development Sub-committee (DSC). |
| **4** | Review current Committees in terms of:<br>■ Their joint capability to manage the Trust's portfolio of activities: making sure that each major activity has a logical home and that the activity is managed properly.<br>■ Whether each Committee has appropriate and clear authority over these activities.<br>■ Ensuring that the Committee can call upon appropriate resources to fulfil their obligations.<br>■ Determining how each Committee can manage itself, through face-to-face discussions or Skype, for example. Whilst these are available at present, extended Committee membership would need to make use of many channels for discussion. These should be defined and implemented. | 3.2.3 | High priority. Ongoing. |
| **5** | Determine where future demand will be placed on National Office. | 3.2.3 | High priority. Ongoing. |
| **6** | Review and improve the use of technology such as email, the website and cloud computing. | 3.2.3 | High priority. Ongoing. |
| **7** | Develop a network of experts. This could be done in parallel with the consideration of Committee structures. | 3.2.3 | High priority. |
| **8** | Develop a succession plan for the National Office. | 3.2.3 | High priority. Responsibility: Chairman and SEO. |
| **9** | A project needs to be established to:<br>■ Determine demand for membership management systems.<br>■ Investigate initiatives already under way in some U3As to determine whether they would be suitable for further development to make them 'industrial strength'.<br>■ Consider the development of a system that can be used by any U3A regardless of what local computers are in use; this would imply an Internet or browser-based solution.<br>This should be an action completed in the short term: in the next financial year. | 3.2.4 | Medium priority. Responsibility: IT Committee (see 10). |

| 10 | A new committee should be established to oversee all areas of technology so that timely guidelines can be issued, seminars developed and online queries answered. The committee should also take into account the development of social media: how it can spread the word and any implications regarding its usage. | 3.2.4 | High priority |
|---|---|---|---|
| 11 | Develop best practice guidelines for the use of email and for the use of websites; they are shop windows and need to be up-to-date, informative and attractive to non-members and members alike. | 3.2.5 | Medium priority. Responsibility: IT Committee. |
| 12 | Break down our core messages into constituent parts, describe those parts properly and use these as guidelines for inclusion in appropriate presentations, articles, conversations. Each can be interpreted according to the individual and the audience but the message must be the same. The constituent parts need not all be delivered at the same time. | 3.3.1 | High priority. Initial Responsibility: Chairman, SEO and Communications Committee. |
| 13 | Develop a set of slides or modules that can be interspersed in conferences and courses. Allow people to pick and choose according to the particular event. | 3.3.1 | High priority. All committees. |
| 14 | In conjunction with widening membership of committees, experts should be asked to contribute ideas on improvements to current practices and procedures. | 3.3.2 | High priority. Responsibility: All committees. |
| 15 | Encourage the capture and sharing of best practice and encapsulate in regular bulletins. Emphasis should be placed on ideas that can be relatively easily repeated and ideas that reinforce the value of exploiting self-help learning. | 3.3.2 | High priority. All committees. |
| 16 | All events should be encapsulated into a single document or indexed webpage so that the description is accompanied by:<br>■ Purpose.<br>■ Benefits of attending.<br>■ Any implications such as size of venue or use of facilitators.<br>■ Frequency.<br>■ Cost — who pays for what?<br>■ Time considerations.<br>Regions should encourage Networks and U3As to understand what's on offer and hold or attend relevant events. | 3.3.2 | High priority. Ongoing. |
| 17 | Devise, capture and publish workshops that can be used to stimulate ideas that can be built on by U3As and their Networks. | 3.3.3 | Medium priority. Responsibility: All Trustees, coordinated by DSC. |
| 18 | Regional Trustees and Networks to work together to identify U3As that are experiencing low or no growth. Work to offer some or all of the following:<br>■ Best practice workshops.<br>■ Ideas for new activity groups.<br>■ Ideas for revitalising the Committee. | 3.3.3 | Medium priority. Ongoing. |
| 19 | Define a slogan or strapline that can be used in all materials, whether for physical, digital or presentational media. | 3.4.1 | High priority. Responsibility as 12. |

| | | | |
|---|---|---|---|
| **20** | Define the Trust's position with regard to external bodies. These should include: <br> ■ Government (local and national). <br> ■ Learning Institutions such as universities and colleges. <br> ■ Learning organisations such as NIACE (National Institute of Adult Continuing Education) <br> ■ Other institutions such as Age Action Alliance. <br> ■ Ethnic organisations. <br> ■ Disability and single impairment organisations. | 3.4.1 | Medium priority. Responsibility as 12. |
| **21** | Commence work on implementing the review of publicity materials. | 3.4.2 | High priority. Responsibility as 12. Ongoing. |
| **22** | Develop templates that can be used for posters and presentational materials and, where applicable, ensure that advice and guidance is available on their usage. | 3.4.2 | High priority. Responsibility as 12. |
| **23** | Construct guidelines as to how U3As could benefit from developing a wider, outward-looking approach to external bodies. Case studies and best practice examples could be published on our website and successes printed in *Third Age Matters*. | 3.4.3 | High priority. Responsibility as 12. |
| **24** | Develop our policy with regard to the in-house development of untutored online courses, and the U3A approach to MOOCs and their exploitation. | 3.4.3 | High priority. |
| **25** | Prepare templates and 'messages to the editor' for agreed topics and ensure that these become active means of communicating with the media. | 3.4.4 | High priority. Responsibility: Communications Committee in conjunction with the Editor of *Third Age Matters*. |
| **26** | Guidance on dealing with the media should be given to U3As so that they are aware of what they can do locally: for example, publicise events such as Open Days and local topical events. Where national media is concerned, they should consult the National Office for guidance. | 3.4.4 | High priority. Responsibility: Communications Committee in conjunction with the Editor of *Third Age Matters*. |
| **27** | Identify those sections of U3A that are seen by their peers as examples of good practice and ensure that they are encouraged to pass on important ideas for action. | 3.4.5 | Medium priority. Ongoing. |
| **28** | Guidelines should be written that outline the benefits of and the issues surrounding social media. | 3.4.6 | Medium priority. Responsibility: IT Committee. |
| **29** | Reinstate the Research committee and determine ways of bringing relevant results to both internal and external audiences. The committee should have a wide-ranging brief that encourages all types of research, from academic work leading to formal publication to focused study for the benefit of the local community or the U3A. | 3.5 | Actioned. |

## Appendix 2: Source Documents used in this Report

- NEC Documents including:

    ⇨ SWOT analysis.

    ⇨ Risk Analysis.

    ⇨ Research Revisited.

    ⇨ Research and External Relations.

    ⇨ Development Committee Report.

    ⇨ Standing Committee for Education Report.

    ⇨ Communications Committee Report.

    ⇨ Risk Group.

- Archive Documents.

- Member statistics and predictions.

- 2010 Survey.

- 2014 U3A Chairmen Consultation Survey.

- National Website.

In May 2014, the National Executive Committee of the Third Age Trust commissioned a survey of all University of the Third Age Chairmen. Their many responses informed the writing of the Three Year Plan which was approved by the National Executive Committee in July 2014.