**U3A INFORMATION AND STARTER KIT**

As at May 2015

This is based on the “Information and Starter Booklet” produced by the Auckland U3A Network.

This booklet has been through several editions over the years:

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| First edition |  | David Grove with original founders of Auckland U3A. |
| Second edition  | 2003 | Graham Ennor  |
| Third edition  | 2011 | Papatoetoe U3A Margaret Noakes and Joan Barton |
| Fourth edition  | 2015 | Modifications made during the establishment of U3A.net |

This information kit has been developed to assist in the formation of U3As It provides guidelines that can be modified and extended as

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We acknowledge Dr John Stewart and his wife Margery for founding the first U3A in New Zealand in 1989.-1990 in Remuera, Auckland

**WHAT IS U3A?**

* It began in France in the mid-seventies
* It has now spread to many countries with hundreds of thousands of members throughout the world.

**“University”**

U3A uses the term university in its original sense as a community of those who come together to seek knowledge and to gain a greater understanding of life.

This differs from today’s more recognized use of the word university which implies set admission standards, lectures, examinations, qualifications and degrees.

In deference to the New Zealand Qualifications Authority, here in New Zealand, we use the term U3A rather than the full title. The word ‘university’ cannot legally be used except by those institutions permitted by law to do so.

**“Third Age”**

U3A is a response to the idea that human life is divided into three periods.

The term third age means no longer in full time work. It does not refer to a specific numerical age, though most members are in the ‘senior citizens’ bracket. It is during retirement that we are able to do those things for which we had neither the time nor the opportunity earlier in life. The third age is seen as an important opportunity for listening, learning and understanding.

**U3A’s Objectives and Principles are to**

1. Provide educational , interesting activities for people who are no longer working

2. Provide opportunities for people to meet, share experiences and pursue commonly held interests

3. Enable those in their later years to become aware of their intellectual, cultural and aesthetic potential , while valuing themselves and their society and lessening intellectual decline

4. Provide resources to aid intellectual, cultural and aesthetic development, thus helping people make

effective and satisfying use of their time

5. Create an environment that is congenial, supportive and socially acceptable to teacher and learner; both being equally valued.

6. Tap the great reservoir of knowledge, skills and experience of retired men and women.

**Principles of U3A:**



1.Each U3A is independent and free to arrange its own programmes

2.Teachers and learners are equal

3.Qualifications are neither required nor given

4.”Teachers”, “lecturers”, or conveners are U3A members and get no remuneration; however interest groups may invite outside facilitators whose time and expertise is recognized by a gratuity

5.Study group meetings are held during the day at a convenient place in the locality, often in private homes

6.U3A is non-political and non -commercial with no central committee in New Zealand, therefore no– one can speak on any political or social issues on behalf of U3As. U3A is not a lobby group.

**Monthly Meetings**

U3As usually meet monthly for about 2 hours.

These occasions when the whole U3A can come together for relevant business and listening to the guest speaker are important;

A possible format is:[This can vary greatly]

* A guest speaker, hopefully with unique experience or a leader in their field for half the time.
* A break for refreshments provides an opportunity to socialise.
* The meeting is rounded out by a “mini-speaker”. This may be:
	+ A member presenting information.
	+ One of the study groups sharing their best talks from the current year. These are of great interest to the wider group.

[It is advisable to have the guest speaker first because if they are delayed, the minispeakers can get the meeting started.]

Special Interest Groups – Study Groups

Each Study Group:

* Meets regularly once or twice a month
* Has between 6 and 20 members
* Its programme is chosen and presented by its members.
* Members are supported in organising their presentation if wished.
* New members may present a 10 minute talk to begin with.
* Each member takes responsibility for presenting to the rest of the group, information on the chosen topic. This may come from their own background experience or research. Outside speakers are sometimes invited to present but, on the whole members enjoy the opportunity to extend themselves.
* Meets in members’ homes or at a community centre.
* A convenor from the group organises the “nuts and bolts”.
* Any member should belong to at least one of these groups. There is no upper limit to how many groups a member may belong to. Just time!
* The real socialising takes place in these small groups.
* By doing this we strive to fulfil the spirit of U3A as stated bt Peter Laslett who founded U3A in the U.K.
* Examples of Study Groups are
	+ Art
	+ Music
	+ Inventors and Inventions.
	+ Literature
	+ History [Modern and Ancient]

**Study Groups are U3A’s point of difference from other groups for Seniors.**

**Management**

*A committee keeps the organisation running:*

* Elected annually
* About 10 members
* Responsible for such tasks as president, secretary, treasurer, new members, newsletter, setting up the venue for meetings, catering, publicity, convenor support, organising the major speaker and website.

**Not all U3As are the same.**

**Each U3A is autonomous and may be slightly different from its neighbour, depending on what resources are available within its membership and within the community. Contact the U3A in your area to obtain more information on the structure and offerings**

The model outlined above is British, the French model being quite different. In France and some other European countries, U3A study groups are taught by working academics, rather like our Continuing Education courses. In Britain, Australia and New Zealand, most U3As are self-help endeavours.

**Other Groups for Seniors**

There are many groups which offer membership for retired folk. Some of them are listed here: Continuing Education classes possibly at Universities and Polytechs, Service groups such as Rotary and Lions. Sports clubs including Chess, Bridge, Mah Jong. Craft and gardening clubs. Social groups such as Probus which offer social contact and interesting speakers.

**Before joining U3A, it is important to read and consider that U3A**  is none of the above although it does contain elements of some of them. Joining a group which suits our needs and in which we can fully participate is very beneficial to us and to the group as a whole. Active participation is the key to that active brain and fulfilment.

**Waiting lists:**

Some U3As may have a waiting list depending on the size of the meeting venue. We really want people to belong to a U3A, if that is their wish, as soon as possible. If any waiting list is too long for this to happen, it is preferable to form of a new U3A.

**Starting a U3A**

**Step 1.**

A U3As may be set up quite easily when there is enough interest in a particular area; or when an existing U3A has a waiting list which is too long. If you are in one of these situations, here are the steps to follow.

* Find a few friends who are interested.
* Read thoroughly what is on this website. [You can download a booklet for easy referral]
* Contact a nearby U3A or U3A Network who could possibly give you help.

**Step 2. Planning for a public Meeting**

With your interested friends:

* Set a date for a public meeting to see what support there is in the community.
* hire a hall with plenty of parking
* invite a member of Network or the nearby U3A to lead the meeting
* advertise in the local papers, libraries, Citizen Advice Bureau, on the radio, and public notice boards.
* invite U3A members from other U3As to attend , to support and enthuse the new members in creating a new U3A
* arrange for tea/coffee and biscuits to be served
* send the report of the meeting to the local papers with a photo if possible
* Ask for a gold coin donation to defray expenses.

**Step 3 What happens at the Meeting.**

* The audience is welcomed.
* How U3A works is explained by (an) experienced U3A person(s) possibly with the help of a Power Point Display.
* Questions are asked and answered.
* A resolution to start a new U3A is moved and carried.
* An interim committee of about 5 is elected.

Refreshments are served.**Step 4 The Steering Committee gets things going:**

The following should be decided at the first meeting or as soon as possible.

* a president, secretary and treasurer and any other officers that the group sees fit
* a date for electing a permanent committee with a quorum of at least five people.
* The date, place and form of the first General Meeting and publicity for it
* An enrolment form [for enrolling new members] with name and relevant details for each member to fill in. Possible Study Group titles may also be listed.
* The amount of the temporary subscription from $20.00 upwards until the first annual general meeting is held. The amount agreed to will need to cover expenses, ie hire of hall, cost of equipment , morning tea supplies and publicity.
* An email address which will remain the same even when the officers of the U3A change.
* A bank account.
* A name for this U3A.
* How to get the study groups started

**Step 5. Publicity**

The need for good publicity when establishing a new U3A is obvious. However in order to maintain a healthy organization and to attract new members, on-going publicity is essential. Methods will vary according to local conditions. The following is intended as a ‘menu’ from which to choose the means most suited to your needs and situation.

Word of Mouth

Often the most effective means of publicity. Members can encourage friends to come to a meeting and to consider joining. Individuals in the community who could make a significant contribution can be especially targeted.

Public Notices

These can be displayed on notice boards in public places such as libraries, church halls, shopping malls, Citizens Advice Bureaus, retirement villages and so on.

Brochures

These can be given to individuals, or placed in locations where the public meet, such as reception rooms at doctors and dentists. Some brochures are available on this website for adaption though individual U3As can make their own.

**Step 6 Organisation – Your Committee**

While each U3A makes up its own mind, the following positions are commonly used. All positions are elected, usually annually at the AGM. Each U3A usually sets time limits for each position:

PRESIDENT/CHAIRPERSON

This position may be for 1-2 years. Once established continuity is gained when the past president and the vice president work together to aid the new President

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SECRETARY/TREASURER

The secretary is responsible for keeping minutes and sending meeting material to any member who has offered an apology. The treasurer keeps the books and arranges payment for visiting speakers.

NETWORK REPRESENTATIVE

If there is a local U3A Network, each U3A will appoint a member to attend the Network meetings and bring back information

SPEAKER GRATUITY

Some U3As give tokens, money or vouchers with the amount varying while some speakers don’t accept reimbursement.

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STUDY GROUP COORDINATOR

This is an important role collating new ideas for new groups and maintaining those in action. The membership is informed as to the progress of each group either by the newsletter editor or verbally at the monthly meetings.

NEWSLETTERS

The editor can be creative in her/his presentation. Usually the monthly newsletter starts with a welcome by the President/Chairperson and also provides the focus for the day and the month’s Study Group meetings. Newsletters include information on study groups, Network, internet reviews and any original contributions.

A Membership manager, Catering Manager, Hall Manager, Almoner and other positions may also be useful.

**Step 6. Starting Study Groups [British Model]**

U3A’s point of difference from other organisations for seniors is our Study Groups. At the same time, prospective members may be surprised or unsure about this aspect.

* Make it clear at the outset to new members that involvement in these groups is a condition of membership. Point out that there are other groups in the community which the new member may find more suitable.
* It should also be clear that each member is expected to give a talk to their small group at some stage. This will be a major challenge to some people who will need support and assistance.
* If the current groups are listed on the enrolment form, the new member can be asked to state a preference which can be followed up by the convenors of those groups.
* Usually Study Groups have a friendly, relaxed atmosphere where people become friends and everyone’s contribution is accepted with interest.
* There are many places to obtain information when preparing a talk – the Library, the Internet, owns own experience, the daily newspaper.

**Ways of structuring a Study Group:**

* Study Groups often meet in a member’s home. Sometimes there are community rooms available
* At the beginning of the year, each member of the group selects a month when they will present their talk. The convenor’s job is really just facilitation [as well as giving their own talk]. Refreshments are usually served.
* The meeting, lasting about 2 hours can be structured in various ways:
	+ Two long talks of about 40 minutes each.
	+ One long talk of about 40 minutes + several “snippet” talks about small relevant items seen on the News, on the internet, etc.
	+ In a language group, one member prepares the reading, one the vocabulary for the day, one looks after the grammar, one gives a short talk about life and customs.
* Outings and trips can be enjoyed.
* It is MOST beneficial to the group if the convenor changes every one or two years so that learning the organisational skills is shared.
* It is possible to start a new study group about practically any topic if there is sufficient interest. We try to avoid groups which already exist in the local community

**Step 7 – Much Later**

**Publicity**

Newspapers

An advertisement in the local newspaper can be considered but this may be expensive. A news item is probably more effective and, if published, will be at no cost. This is best done by a person with journalistic knowledge, and will include what U3A is, time, place, the speaker and the topic. Also special activities can be publicized.

Press Releases

A press release should only be used for special events. It should be detailed enough for a reporter to write a story from it. It must be brief and punchy. Check with the press about the format required. If appropriate give the time and place of photos taken.

Radio

Local radio and television may be available. This will require someone to front, who is articulate, enthusiastic and well briefed. Arrange a community service announcement and include the time and place of the next meeting and the telephone number of the contact person. To maintain confidentiality it is suggested to use only first name or initials.

Media Relations

Invite a reporter from the local newspaper to attend a U3A meeting to report on it. Care should be taken with the words we use in describing U3A. Acceptable words when describing U3A; learning activities, members, co-coordinators, conveners rather than lecturers, teachers, or instructor.

**A Constitution**

Each U3A is advised to have a constitution which, amongst other things, provides guidelines for the AGM

* on appointing its President, vice President, secretary and treasurer and the committee.
* prepare nomination forms that state the name of the person for the position, a seconder, and a note that expresses approval from the nominated person. A ballot may be required if the position is contested.
* decide on a quorum.
* Advantages
* The constitution is simple to prepare and to change as no outside approvals are needed.
* Disadvantages
* Does not bestow any status on the organization and does not give legal protection against misappropriation of funds. The treasurer and the committee are personally liable. Some U3As have found that banks are reluctant to open accounts for unregistered societies.
* **Your U3A may prefer to become an Incorporated Society or a Charitable Trust**
* Go to the website below to find out the latest information and rules governing these bodies. These do keep changing.
* [www.societies.govt.nz/cms/incorporated-societies](http://www.societies.govt.nz/cms/incorporated-societies)
* It is not advisable for a U3A to have a taxable income. E.g. to put extra funds into a savings account at a bank as this will create interest which will need to be taxed. We as an organisation, do not exist to make money. Having to put in a tax return is something we can all do without.

**Some History:**

**Auckland**

Auckland U3A Network has existed since the early 90’s. It is an informal forum where representatives from the regional U3As meet 3 times a year. The purpose being to share information, bring ideas and problems for discussion and to set up new U3As.

One representative from each U3A makes up the Network which meets at a designated venue in Auckland. Network gathers information from individual U3As and makes it accessible to all.

Network will support learning oriented projects arranged by individuals and /or regional U3As.

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Auckland U3A Network believes there should be no waiting lists for people who wish to join a U3A.

From the start of the New Zealand U3A movement in 1989 there was rapid growth particularly in the Auckland region. To help with the formation of new U3As the Network prepared an information kit. The rate of growth now is reducing. Even so the Network in 2011considered there was still a need for this kit. Accordingly a decision was made to update the second edition and to make it available to all in an electronic form which can be printed if required. This edition is a further updated version of that document.

Presently there are 24 U3As in the greater Auckland region with opportunities for new ones to be established.

**Adult Learning Principles**

[Peer Education Coordinator for COTAQ (Queensland Council on the Ageing) by the National Prescribing Service of Australia in 2003.]

**We need to keep in mind these Principles when planning our U3A programs?**

* In a study group situations?
* In a lecture type situations?

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| ***Adults learn best......*** |
| 1. In an emotionally secure environment (they feel safe and relaxed)
 |
| 1. In an informal learning environment
 |
| 1. When they want to learn – individuals decide whether the material/issues have relevance for them
 |
| 1. By using different learning channels, ie through their senses
 |
| 1. By doing
 |
| 1. By drawing on previous experience, ie their lifetime ‘bank’ of knowledge, understanding, skills and experience to enable them to arrive at the concept or message relevant to the new learning experience
 |
| 1. When the sharing of useful ideas, information and experiences is acknowledged and valued
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*Remember always that the quality of learning is not so much dependent upon the quality of the information provided but upon the quality of the relationships that exist between people in the group. If people feel safe, and that they and their contributions are valued and appreciated, then learning WILL happen****.***

*‘Learning begins easily when one listens to another with the hands of being held out to give and receive. Learning flows freely when feeling and knowing and doing are shared with another and another and another.....’ (from “And now it flows: Release of Learning”, Nunawading North Neighbourhood Centre, 1979)*