Principles and practices of mature-age education at U3As

Rob Siedle
University of the Third Age Hawthorn, Victoria

A movement known as the Universities of the Third Age (U3As) provides educational, cultural and social services for mature-age people in Australia and internationally. This paper focuses on the educational courses run by U3As and discusses two basic questions: What are the expectations of learners who enrol in these classes? and How can tutors best meet these expectations? In 2011, there were 97 U3As in Victoria, with an aggregate of 24,800 members. All tutors are voluntary, and members of U3As pay a modest annual fee of only $40–$60 which entitles them to attend any of the courses on offer.

This paper is based on three major sources: highly respected sources on adult education (cited in the references); the findings of the 'Tutors' Round Table Conference' held at the U3A Hawthorn on

2 October 2010; and comments from tutors about their experience in delivering various subjects.

It also recognises the culture of U3As in general, in that tutors are given the widest possible discretion in the way they run their courses. This means that classes might vary from a very structured, language course to a very informal, current affairs class where the tutor is more a facilitator than a lecturer or where the tutor might regard himself or herself as simply another member of the class.

Founded in 1984, the University of the Third Age (U3A) Hawthorn is open to anyone over 55 years of age. Today, it offers 103 courses to about 1,200 learners (members), and it has 80 tutors. Despite the wide variety in the nature of classes, every tutor strives to give students the best possible experience during the class, whether this be some new learning, a good social or cultural experience, or simply a source of stimulation and enjoyment.

The Strategic Plan of the U3A Hawthorn for the period 2010 to 2013 includes these guidelines:

- We will provide a broad range of quality activities in a friendly community environment for members of the Third Age.
- To this end we strive for continual improvement in the quality of our courses and our administrative processes.
- Our role and purpose: maintaining an active mind is a key factor in maintaining the health and happiness of senior members of our society.

Adult learners have special needs: Malcolm Knowles

The major thesis in the works of Malcolm Knowles (e.g. 1998) on adult learning is that adults have special needs that are different from the needs of younger students. At the obvious level, U3A learners are not attending classes to obtain a degree or to qualify for a job: they

attend classes, as many have pointed out, 'for the love of learning'. Nor do U3A learners attend classes because these are compulsory. On the contrary, they are free to switch classes at any time, so that tutors must be aware that members will 'vote with their feet' if they are not satisfied with any aspect of the class.

But there are other, deeper differences between adult learners and, for example, university students. The first, as Knowles has pointed out, is that adults are highly independent in their approach to any subject. They do not need to follow the orientation, systems or belief of any tutor. On the contrary, they want to have a part in running the class. This means they should be consulted on a whole series of matters: the syllabus for the year, the books or other materials to be used, and the style of the class. For example, do they enjoy forming discussion groups of four or five? Do they prefer to participate in the same group each time or should the groups be re-arranged from time to time?

Learners like to set their own goals, and these might differ even in the same class. One person might be interested in the major turning points in history, while another might be more interested in the meaning of history. Because learners are goal-oriented, they will appreciate a program that is well organised and has been clearly defined. Tutors should show their learners the course objectives early in the course and they should encourage and assist them in setting personal goals. Knowles suggests that tutors might encourage learners to complete a personal goal sheet at the beginning of the course. Other tutors might prefer to state an outcome for their course, such as: 'At the end of the course, you will be able to...'.

A second emphasis in Knowles' work is that mature-age learners bring a rich life experience to class. This might be from their career as a doctor, a nurse, a teacher, an engineer and so on, from family experiences, from a recent crisis in their lives or from previous studies. Tutors need to be ready to recognise when learners are

drawing on their previous experience and should consider how they can help them to connect new learning to their own experience.

Learners are constantly asking themselves whether and why the course of study is relevant. They like to see a reason why they should study a certain subject, how it is relevant to their interests and plans, and what value it has for them. This is easier with a language course where the person may be planning a trip to Italy or France, but more difficult in a course in ancient history, philosophy or poetry. Tutors should show why the course is relevant during every session, and whenever they introduce a new topic. It will help if tutors can present concepts or theories in a setting that is familiar to their learners. One technique is to ask whether they can think of a situation in which the new concept would be useful; another is to provide an everyday example to illustrate the concept or theory.

In Shakespeare classes, for example, learners might find passages that stimulate their thinking or comic passages that heighten their sense of humour.

Adults have learnt from their lives that it pays to favour things that are practical. This might present a challenge to tutors in academic or theoretical subjects, but learners will always appreciate any attempt to bring the topic 'down to earth'.

Apart from the educational merits of a subject, there are many other important factors that motivate mature-age learners. Joining a like-minded community, being amongst colleagues and making new friends rank very highly on this scale. The social and cultural benefits of being a U3A member are real and they are recognised by tutors. Some tutors start a new course by encouraging all present to introduce themselves to someone they have not met before and discuss why they have enrolled for the class.

Surveys have shown that, when learners who were particularly satisfied with a class were asked why they enjoyed it, statements like 'I found it stimulating' and 'It appealed to me personally because ...' occur frequently. Learners want some serious learning from a class. They want to feel the tutor has presented something of real substance; and they want to be challenged and stimulated.

Some learners are motivated by cognitive interest. They enjoy the act of learning for its own sake and they seek every opportunity to satisfy an inquiring mind. Above all, however, Knowles claimed that learners want respect and recognition. They want to know that the tutor is aware of, and respects, the wealth of experience in the classroom. They value a tutor who is keen to hear their opinions, who treats them as equals and who gives them opportunities to voice their opinions.

How should U3As regard the question of rewards? It is only human for a learner who has spent a full year studying a subject to appreciate somehow being affirmed for what they have done. Knowles states that one of the motivations of the adult learner is to feel they have been able to 'fulfil the expectations or recommendations of someone with formal authority'. In business life, people attending even a two-day course receive a certificate. As certificates or any form of written acknowledgement are not a part of the U3A culture, the question of how the tutor can affirm the progress of a learner remains a challenging one.

However, there are many informal ways in which tutors can recognise the efforts and achievements of learners. One is to praise those who make a contribution during a class. Another is to tell the class how successfully it has progressed in a certain topic or subject. And a third technique is to speak to learners individually. Some classes hold a party at the end of a course or at the end of the year—this provides a feeling of recognition and achievement.

Tips for effective tutors

Through his work, Knowles has these various tips:

- Establish a receptive attitude in the class. Start by showing the class why the new subject will be useful and relevant, and make sure that all learners feel comfortable and relaxed.

- Set a good feeling or tone for the class with an open, friendly atmosphere (humour will always help). Some tutors have been known to start every class with a humorous story. Others ask learners for their 'news of the week' before they start, and encourage them to say what they have done or heard during the past week.

- Set an appropriate level of expectation, even of tension, if you are introducing a particularly important subject. However, bear in mind that people learn best under low or moderate stress, and if the stress level is *too* high, it could be a barrier to learning.

- Have an appropriate level of difficulty. The level of difficulty should be sufficient to challenge the learners, but not so high that they become discouraged or frustrated.

- Encourage learners who might question what you are presenting, or who say the material is not relevant. Try to see any challenge as positive, as it gives you, as the tutor, the best opportunity to justify the subject of topic or theory you have selected.

Experience-based learning

Another of the leading theories on adult education emphasises that learning should be based on the experience of the learner. A chapter by Andresen, Boud and Cohen, entitled 'Experience-based learning' in the book, *Understanding adult education and training* (Foley 2000: 225), opens with this statement:

> The distinguishing feature of experience-based learning (or experiential learning) is that the experience of the learner occupies

a central place in all considerations of teaching and learning. This experience may comprise earlier events in the life of the learner, current life events, or those arising from the learner's participation in activities implemented by teachers and facilitators.

The chapter authors set out a series of guidelines for experience-based learning (EBL). These are summarised below.

The essence of this approach is that, during any class, the learner is not simply taking in what the tutor or other members of the class are saying; that is, the learner is not listening *passively*. Instead, he/she is listening *actively*, and even while the tutor is speaking the learner is asking (inwardly): Does this agree with my experience in [whatever their discipline was]?

The EBL approach has been a reaction against teaching modes that were too didactic, too controlled by the teacher, and based on an overly-disciplined transmission of knowledge. Supporters of EBL consider that the learning effort should come from the learners and that all learning should be participative. It should not be the role of the teacher to express the meaning of a given element of learning; rather, it should be up to the student to ascribe meaning to it.

EBL can be used for both formal and informal learning. An example of the second could be an excursion to a museum, and—of special interest to U3A students—lifelong learning.

Characteristics of experience-based learning

EBL should involve the whole person—intellect, feelings and senses. Role-playing or even discussion can assist in this. Passive learning, where the learner simply sits and listens to a lecture, is the furthest removed from the EBL ideal. A step forward would be for the learner to have a fact sheet to follow, thus involving both listening and reading. A further step would be to use discussion groups, in which learners have opportunities to discuss their views on a given subject

with their colleagues. As Confucius said, 'I hear and I forget. I see and I remember. I do and I understand'.

If learners can relate new learning to their own experiences, the learning is more likely to be included in their memory and understanding. Reflective thought is important to the learning process. Learners take in the new learning and then reflect on it in terms of their own experience, thus transforming an earlier experience into a deeper understanding. The authors (Andresen et al. 2000: 226) state that: 'the quality of reflective thought that the learner brings to any experience is of greater significance to the eventual learning outcomes than the nature of the experience itself'. Kolb (1984: 38) has also written: 'Learning is the process whereby knowledge is created through the transformation of experience'.

EBL makes use of self-assessment as a way of building confidence in the learners and of enabling them to crystallise their knowledge.

EBL can operate in three modes. First, it might use structured learning activities. These can include simulations, games, role plays, visualisations, group discussions, dramas or play-acting, or hypotheticals. Second, the tutor might favour facilitation. The success of the facilitation depends on the skill of the facilitator. EBL assumes that there will be a relatively equal relationship between the learner and the facilitator, and that learners will have a high level of control and autonomy. This is certainly the style of facilitation used at U3As. Third, the tutor might rely on assessment. Assessment is specifically excluded in U3A classes because of the voluntary learning principle and the fact that people enrol for courses purely 'for the love of learning'. However, in the list of assessment methods used in EBL, it is interesting to note the inclusion of self-assessment and peer assessment. U3As might wish to give further thought to the use of such assessment techniques.

EBL emphasises that learners study a subject that is significant to them personally. This accords with the spirit of educational courses at U3As, where students do not train to receive degrees or to qualify for jobs, but rather to become familiar with, or even to master, something of special interest.

Essential criteria for EBL learning

Certain criteria are considered essential for learning based on the EBL model. There must be a primary focus on the reason why the learner has enrolled for the course and what they expect from it. The course must include debriefing and reflective thought. Learning must involve the whole person. The education must recognise that the learner is not simply a 'learning machine' (in a way that children might be viewed in a primary school), but is a *person* with senses and feelings, perceptions, awareness, sensibilities and values—in other words, with the full range of the characteristics of a vital human being. The process must recognise the attitudes, previous learnings and world views that learners bring to the class. The leader must have an ethical stance that accords respect for the learners, values their wellbeing, recognises and validates each individual, and recognises they want to be self-directed.

The many forms of EBL used in vocational and professional education are also very suitable for use in U3A classes. These include case studies, role plays, hypotheticals, video-based activities, group discussions, syndicate methods, autobiographical writing, problem-based learning, group work and self-directed projects.

In summary, experience-based learning draws on learners' previous life experiences. It engages the whole person. It stimulates reflection on experience. It encourages openness towards new experiences. And, overall, it encourages continuous learning.

Comments by U3A tutors

The following is a selection from comments made by U3A tutors regarding their classes at a Tutors' Conference held on 2 October 2010.

Delegates felt that tutors should begin their classes by providing an outline of the course and request feedback at regular intervals, but they should also note that course descriptions are only a guide and that tutors can change the content if required. A language tutor stated that all her classes use role-play, as it provides a challenge to the learners and also introduces them to each other. She regards role-play as a vital component of her classes.

The problem of dominant class members who seek to monopolise discussion was raised on a number of occasions. It was felt that when a learner persistently wishes to dominate the class, the tutor should ask for alternative views and also make time at the end of the class for a private discussion with the class member. Great tact should be used in handling such problems so as to avoid alienation. Despite the foregoing, however, the tutor remains, at all times, responsible for the direction of the class.

Tutors should encourage the shyer, more reticent members of the class to select an item of interest and then give their views on that item. This increases their confidence.

Tutors should find ways to affirm members of the class to show that every member of the class is seen as an important contributor. Tutors should also find ways in which they can recognise the experience and value of every class member.

Language classes should provide intellectual stimulation and an opportunity for social interaction. There should be a strong sense of fellowship between all class members. The issue of dealing with learners who are not keeping up to class standards is problematic.

Some learners tend to 'self-evaluate', that is, ask to repeat a year if they have fallen behind, and this can be easily organised.

In Current Affairs classes, all tutors are individualistic and therefore their styles and presentations will differ. Some tutors feel that the U3A should combine entertainment with education. The group dynamics of a class should be excellent and friendship should be a big component of a class. By the end of the year, the learners should have the ability to discuss a range of ideas and they should have learned a number of new insights. Tutors should encourage presentations from individuals. These build self-confidence and self-esteem because the presenters are recognised and acknowledged by the group. It also fosters a sense of community and mutual trust. The work of presenters should always be acknowledged.

It is also very valuable to obtain feedback from the class. A language tutor who consulted the class found they suggested the following guidelines for tutors: class attendance should be regular; content should be well organized; tutors should have a strong knowledge of their subject and provide clear explanations; there should be an overall direction, showing where the class is headed; tutors must be sensitive to the needs and personal feelings of their groups; and there should be a sense of humour and of social engagement. A cup of coffee at the conclusion of the class is always welcome.

As there are no tests or examinations in U3A classes, tutors need to develop ways to measure comprehension. Is the tutor going too fast for the majority of the class? Is the tutor introducing too much new material and failing to give the class the background or the preparation to assist them in absorbing the new material? Such issues suggest that tutors should ask questions regularly: Am I going too fast? Does everyone get the general idea? Please comment if you are having difficulties. What do we think of these ideas?

One helpful technique is the use of a questionnaire. When the tutor has completed a new topic, he/she should ask learners to complete a questionnaire during class. It is useful to start with general questions, asking whether they find the subject useful and interesting. The questionnaire can then ask for some more specific information.

Some tutors have developed specific settings and techniques for their classes. One example is a Shakespeare tutor at the U3A Hawthorn who has developed what he calls an Encounter Group. The Encounter Group is a small educational group that comes together to study a particular subject, often with a member who has some specialist knowledge of the subject. In the case of the U3A, this member is the tutor. The tutor acts as the facilitator of the group in that he or she organises the venue and introduces the subject, and encourages discussion but does not dominate the discussion. The concept is to form a group in which the individuals share experiences and, in so doing, not only learn something about the subject but also learn something about the other members of the group. And, of equal importance, they might learn something about themselves. Members form strong and lasting relationships and develop a bond with other members and a caring attitude towards members who are sick or have social troubles. Thus, while the Encounter Group is primarily a learning group, it is also a social group.

Results from a research project

A representative panel of five tutors was asked a series of three questions. The replies to these questions are discussed below. The tutors provided classes in Languages, Literature, Philosophy, and Current Affairs (two).

The first question was: In your class, what is your major aim? The answers were as follows:

Language tutor. My major aim is, of course, to help my learners learn French as that is *their* aim. To achieve this, however, classes must be designed to be both informative and interesting, and also to be a time they enjoy. A sense of achievement is important, so that I try to reinforce the positives whilst continuing to progress.

Literature tutor. My major aim is to create an enjoyable learning environment.

Philosophy tutor. I concentrate on giving students an enjoyable experience. This includes mental stimulation, discussing philosophies that they see as relevant to them, some active class participation, some lively banter and some humour. A class should have a strong learning base, but should also be a fun experience.

Current affairs tutor A. My principal goal for each class member is not only to achieve greater knowledge but also to increase confidence. By class discussion and by learners preparing and occasionally presenting a paper, my aim is this: that they will begin to enjoy contributing to normal social discourse among their non-U3A friends by widening their friends' understanding of topical issues of the day. My secondary goal (based on my strong conviction that adult learning must have a strong social role) is to encourage after-class socialising and discussion, and to encourage learners to talk to absent members who may be ill, or on holidays, and to ask for vacation highlights to be shared on return.

Current affairs tutor B. To share our understanding of particular events or policies in domestic and international affairs, so that each member of the class is better able to understand the issues and make his or her own judgment.

The second question was: What are your major problems?

Language tutor. I really don't have any major problems. Better teaching equipment would be much appreciated.

Literature tutor. Establishing a venue. My house might be the best choice.

Philosophy tutor. The learning model for our class is to cover and discuss the major thoughts of leading philosophers from Socrates to the present day. As many of the learners have been in the class for three years, and some for more, the problem is to cater for new people while introducing fresh material for the ongoing learners.

Current affairs tutor A. To achieve my principal goal, I need to find ways to encourage the more tentative class members to make their first presentation and overcome their performance anxiety. The method I am using, with encouraging results, is to ask first-time presenters to review or précis a press piece, a film, or a book. This 'training wheels' approach postpones the more challenging step of exploring the self-interest of the major players in the current affairs' topics we discuss, then injecting their own opinions and advancing alternative strategies for addressing the problem.

Current affairs tutor B. There are no major problems, but in a group such as this, it is important to ensure that no one person dominates the discussion, and that every class member has an opportunity to voice an opinion.

The third question was: How can we make our classes more interactive?

Language tutor. Because language teaching – particularly in the early years—is very much teacher-based (chalk and talk), interaction can only be encouraged as skill with the language develops. Despite this, I do try to include interactive activities when possible.

Literature tutor. I think it is not feasible to have group interaction with large groups. All members in my groups participate in each session. I therefore restrict the size of the groups to 12 participants. I find this is the largest group where the members still act as

individuals. In larger classes, they tend to form smaller groups—but this leaves the participation to the leaders of the smaller groups. Large classes, which are useful for giving information, can include questions from the floor, but this can hardly be termed interactive as the questions are restricted to a few and they must be strictly controlled. I think that there are reasons for having both large classes and small classes; large classes for imparting information by experts, and small classes for exchanging information between all members of the class.

Philosophy tutor. As this is a large class, with 40 to 50 students each week, the tutor's style must be highly interactive, frequently asking questions and calling for contributions. I encourage learners to present topics; I use group discussions; and I always take a break in the middle of the class to allow further discussion.

Current affairs tutor A. Interactivity and class involvement can be improved by intentionally polarising an issue and inviting members to adopt a partisan position, thus aiming to generate some tension in the discussion and discover arguments and counter-arguments which may have remained undiscovered. The aim is to encourage learners to take a position on the issue and feel involved.

Current affairs tutor B. Because the class is kept to a maximum of 15, there is an appropriate level of interaction.

Conclusion

The aim of this article has been to examine the purpose and nature of the educational services provided by the Universities of the Third Age (U3As) in Australia. U3As are a lively and growing movement that is providing valuable learning services for Australia's mature-age population.

The major conclusion is that mature-age learning is very different from learning at universities and other tertiary institutions. Older

learners demand a high level of control over what is happening in their classes, and they are at all times relating their learning to their own lives and academic experiences. Tutors, for their part, cannot afford to simply impart knowledge and information. Their approach must be holistic, implying that they must recognise, and cater for, the human needs of learners, which can include educational, cultural and social needs.

At present, the educational offerings of U3As are largely fragmented because they must rely on prospective tutors coming forward and offering to cover a certain subject. It is to be hoped that this article will encourage further discussion and analysis of the educational role of U3As and, consequently, help them plan and shape their offerings.

References and further reading

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About the author

Rob Siedle, *MA (Oxon), read for the Honours School in Philosophy, Politics, and Economics at Oxford. He has been a Philosophy Tutor with the University of the Third Age Hawthorn since 2004 and was elected Tutors' Representative in 2010. His major research interests are: finding the best model for teaching popular philosophy, as distinct from academic philosophy, and how to help students use the insights of philosophy to improve their reasoning powers and enhance their everyday lives.*

Contact details

83 Illawarra Road, Hawthorn, Victoria 3122
Tel: (03) 9819 2160
Email: rsiedle@optusnet.com.au