A New Learning Adventure for Third Agers

Project Report

May 2010

LANCASTER UNIVERSITY

U3A Lancaster and Morecambe

Lancaster University Senior students LUSSA

THE LEARNING REVOLUTION

TRANSFORMATION FUND

Project Report
A New Learning Adventure for Third Agers

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Section One: Introduction and Outline

The project was designed to link members of Lancaster and Morecambe University of the Third Age (U3A), with Lancaster University. Building on work done with older people at the Department of Continuing Education, this project had five elements.

1. To provide links for members of Lancaster and Morecambe U3A to attend first year undergraduate lectures (Open Lectures) where there was space available.

2. To provide a programme of weekly lunchtime lectures from academic departments around the University open to members of Lancaster and Morecambe U3A and other local older people.

3. To provide regular Learning Circles where project participants could discuss and share their learning.

4. To provide supported access to the University Library and the university Virtual Learning Environment (LUVLE) for project participants and to provide links to University activities such as public lectures and seminars.

5. To make links between University departments and U3A group leaders.

The main aim of the project was to provide a demonstrator project for how a local U3A could work with a top research university for mutual benefit. To this end an end of project conference and a 'how to' guide were built into the project, in addition to dissemination activities at national conferences (eg national U3A conference (September 2009, Edinburgh), Universities UK conference on Older People and Education (February 2010, London), and a presentation at the national UALL (Universities Association of Lifelong Learning) conference March 2010, Oxford.

The target group was members of Lancaster and Morecambe U3A, a flourishing local group with more than 700 members. Over 140 participants took part in the different activities and 129 members of the U3A attended the first part of the Celebratory Learning Day at the end of the conference. 18% were aged 76+, 79% were aged 51-75, and 3% were aged 26-50.

A very close working relationship was built up between Lancaster and Morecambe U3A and the Department of Continuing Education, with monthly management meetings, and additional meetings when required. In addition, a group of ten volunteer older people, the 'LUSSA 'core' group' - around half of whom were U3A members - worked with the project management team to help to coordinate and run the project, assisting with all aspects of the programme. They chaired lunchtime lectures, helped with mailshots, acted as stewards, supported individual participants with computing and library tasks, and provided very clear steer to the management team on what was going well and what needed to be improved. The 'LUSSA 'core' group' had previously set up the Lancaster University Senior Students Association (LUSSA) which was formally the third partner in this project.

University academic departments responded well to the call for lunchtime lectures, with Heads of Department often putting themselves forward to participate. Student evaluations of the lunchtime

lectures were very high. Many of the departments used the links they had made with the senior learners to assist with their own research projects, calling on our participants to join focus groups or take part in individual interviews or experiments – for example in medical science, philosophy, End of Life Care, Health, Educational Research, and Psychology.

The Open Lectures (undergraduate lectures) were well received with many participants getting fully involved – one participant asked to do an assignment on a voluntary basis – and got third place in the year, with her poster exhibited in the department!

The conference attracted 13 different University of the Third Age organisations from around England, Scotland, Ireland and Wales, and three universities, interested in finding out what we'd done.

We responded quickly to suggestions from the U3A committee and the LUSSA 'core' group for improvements (such as finding a room in which to hold post lecture discussions).

The Learning Circles didn't take off as planned (see evaluation, section three).

As anticipated, there were some difficulties in getting the participants using departmental virtual learning environment platforms for undergraduate learning modules, and it was quite difficult to get University departments to respond to requests from U3A group leaders for links.

The project could not have been delivered without the help of the LUSSA 'core group': a group of volunteer older people who made sure that the programme was responsive to the needs of older people, and provided practical help on a weekly basis.

Unexpected spinoffs and ongoing sustainability

We worked in partnership with the U3A on a bid to NESTA for developing informal learning in workplaces. Although the bid was unsuccessful, this partnership has forged links with the University's new Centre for Ageing Research at Lancaster University which agreed to take on this programme after it comes to an end within the Department of Continuing Education.

A strong and ongoing partnership has been developed between the University and the U3A. U3A partners worked closely with the LUSSA 'core group' and the Department of Continuing Education project managers to ensure a smooth transition of all the elements of the project to the University's Centre for Ageing Research, within the School of Health and Medicine, as the Department of Continuing Education is to be laid down by Lancaster University at the end of July 2010.

Section Two: Project Evaluation

The evaluation was carried out by Professor Emeritus Keith Percy and this section is a summary of his findings.

Part 1. Aims, objectives and methodology of the evaluation

A. Aims
The key aims of the New Learning Adventure (NLA) project evaluation were to:
1) establish whether the project contract objectives had been achieved
2) identify to what extent (a) the learning activities planned to be provided by Lancaster University for the Lancaster and Morecambe U3A were provided and (b) to what extent those provided succeeded and were beneficial to the learners
3) form a view on the sustainability of the structures, management and content of the project in the local situation and if rolled out to other universities and other U3A groups

B. Objectives
1) to evaluate the following project contract objectives:
   i) set up a demonstration model
   ii) access University learning for U3A members
   iii) information, advice and guidance on course choice for U3A members
   iv) run structured learning circles
   v) develop a sustainable link between Lancaster University and the Lancaster and Morecambe U3A group
   vi) make links between U3A groups and University departments
   vii) disseminate lessons learned
   vii) set up an information, advice and guidance facility for other universities and U3As.

2) specifically to evaluate the following project learning activities:
   i) Open Lectures
   ii) lunchtime lectures and discussions
   iii) learning circles
   iv) use of Library and Lancaster University Virtual Learning Environment
   v) encourage access to public lectures, exhibitions, events etc.
   vi) assistance offered by university departments to U3A group facilitators

3) to collect evidence relating to sustainability and roll-out in the following areas
   i) contexts
   ii) structures
   iii) management
   iv) costs and benefits
   v) values

C. Methodology

The evaluation of this project was formal and substantial. It was carried out by an independent evaluator, following acceptance of a tender and consisted of the collection of a large amount of quantitative and qualitative data. A further, more detailed, report of the analysis will be published in late May.

The evaluation fieldwork consisted of the following (numbers of activities/respondents in brackets):

- Analysis of pre-course expectation forms
- Analysis of interim and post-course evaluation forms
- Interviews with participants (20)
- Focus groups with participants (3)
- Interviews with university teaching and administrative staff (8)
- Observation of activities (10)
- Discussion with LUSSA 'core'group
- Interviews with key DCE staff, including members of NLA management group (3)
- Interviews with U3A members of NLA management group(3)
- Questionnaire survey of NLA participants (149)
- Questionnaire survey of U3A non participants
- Debrief/evaluation session with NLA steering group

D. Key questions

As implied above, viz:

- Were the project contract objectives achieved?
- Did the relationship between the Lancaster University and the Lancaster and Morecambe U3A work?
- Who were the learners and how did they participate?
- Was the scheme beneficial to the learners?
- What learning activities were provided and which worked well?
- What were the costs and what were the benefits?
- Could the project content be sustained?
- What would it take to roll-out the successful project content to other universities and other U3A groups?

Part 2. Evaluation Findings

A. Learners

Table 1 Characteristics of the learners participating in the New Learning Adventure (Sept 2009 – March 2010)

Total enrolments	149
Gender	74% female
Ages	70% between 60 and 74 years
	[range 46 – 89 years]
Highest educational qualification	22% postgraduate qualification; 29% first degree; 29% professional qualification
Age left full-time education	73% at 21 years or over
Participation in post-initial education	69% 'current' & 'recent'; 31% 'past'
Current Lancaster and Morecambe U3A	78% (115+)
Members of other U3A groups	2% (3)
Former participants in University Senior Learners' Programme	32% (48)
Of L&M U3A:	
Member for over 2 years	50%
Member for 12 months to 2 years	37%
Member for less than 12 months	13%

Note – because of missing data the number of L&M U3A members participating in NLA may be as high as 130. 115 represents 16 % of the current (February 2010) L&M membership of 734.

The typical NLA learner may, therefore, be characterised as female, aged between 60 and 75 years, educated to degree or professional level, left full-time education around 21 years, participates in post-initial adult education and is a member of the Lancaster and Morecambe U3A.

B. Learning activities

Open Lectures

Table 2: NLA learners' enrolments in Open Lectures (October 2009 – March 2010)

Individuals enrolled	56
Enrolled in Term 1	49
Enrolled in Term 2	31
Enrolled in both terms	24
Enrolled in Term 1 only	25
Enrolled in Term 2 only	7

Individuals enrolled from U3A   52

From the total of 149 learners enrolling in the NLA, therefore, 56 enrolled to attend Open Lectures - undergraduate courses of lectures. In Term 1, 54 learners had wanted to enrol to attend 69 courses. Because of limitations of space and wariness about 'over-loading' any lecture course with NLA learners, 49 learners were enrolled to attend 52 lecture courses. In Term 2, 31 learners wanted to enrol to attend 38 courses of lectures and, in the event, all 31 were enrolled to attend their chosen 38 lecture courses.

In total there were 90 enrolments to attend 20 + lecture courses in 15 subjects. Almost all attendances were at first year (Part 1) level. Table 3 shows the distribution of attendances between broad subject areas:

Table 3: Distribution of attendance of NLA learners between subject areas

Humanities   **30%**
(Religious Studies; Philosophy; Creative Writing; European Languages & Culture; History)
Social Sciences   **41%**
(Linguistics; Sociology; Media & Cultural Studies; Politics; Economics; Gender & Women's' Studies; Law)
Sciences   **27%**
(Psychology; Environmental Sciences; Biological Sciences)

First year lectures at Lancaster University have large attendances of up to 300 or more undergraduate students and are normally not interactive. When lecturers ask questions of their lecture audience, the questions often go unanswered. The evaluation shows that the presence of a few NLA learners could make a difference. One lecturer told us

"There were one or two times when I'd asked a question and it was deadly silence and then they (the NLA learners) answered and I thought 'thank goodness'. It was much appreciated."

Formally, NLA learners were not enrolled to attend the small group seminars which were conducted by lecturers, other academic staff or postgraduates and were normally discussion-based. The evaluation showed that in some cases lecturers invited them to attend and, once again, the presence of NLA learners was held to be valuable, particularly when they could draw their life experience into discussions in a relevant manner. One NLA learner recorded on an evaluation form:

"[it was] great for undergraduates to see other viewpoints – several have commented on this"

The patterns of NLA learners' attendance at Open Lectures were very various. From the evaluation interviews, we know that some dropped out quickly because, for example, they were over-committed in time. One 85 year old man reported that he could not only spare one day a week. Any more, he said. and *"it would have taken over my life"*. Others dropped out because of the difficulties of travel and car-parking, or because they had not realised that they would have to attend campus on more than one day per week for many courses or because they had enrolled just to try the lectures out and now were satisfied. We know that some stayed for some weeks and then ceased attendance.

One lady told us that she had much enjoyed the first half term but then the lecturer changed and there was a new topic which she found less interesting. "*I was there for enjoyment* she said so *although the lecturers were admirable I stopped going*."

Table 2 above showed that 25 of 49 learners who had enrolled in the Winter term did not did not re-enrol for the Spring term. Nevertheless, the admiration for lecturers was expressed often. Another lady said to us: *"university lecturers do not know how fascinating and interesting they are. People hang on their every word."*

NLA learners were asked in interview what were the learning outcomes for them from their attendance at Open Lectures. Words such as *interest*, *enjoyment* and *curiosity* were frequently used. Some talked about keeping *mentally healthy* by being intellectually *stretched*. In terms of the value of attending the lectures, one lady, for example, said that linguistics lectures had radically *"changed my attitude to my own language"* and a man attending politics reflected how valuable it had been to be in lectures *"as a concentrated period of thinking about one topic"*.

By contrast, another learner described how she stopped attending her lectures because of the *isolation* she experienced in them. There was a large group and nobody spoke to her. One learner reported that *"the media studies lectures were marred by constant coughing"* so she only attended two.

Lunchtime Lectures and Discussions
There were 20 NLA Monday lectures during the two University terms in a lunchtime slot of 50 minutes. The format was normally that of 40 minutes lecture and ten minutes question and answer. Usual attendance was between 30 and 40 NLA learners. End of winter term evaluation responses by 34 NLA learners showed that the mean and median attendances per individual were 5 lectures out of 8 that term. Over the two terms, 78 different individuals attended one or more lunchtime lectures. There was, of course, significant but not uniform overlap with attendance at Open Lectures. Some people organised their Mondays so that they stayed on campus all day, attending undergraduate lectures, the lunchtime lecture, and a discussion if there was one and otherwise using the University library.

The topics of the lectures were varied. They normally related to one of the areas of research of the lecturer and were a window through which NLA learners could view the research excellence of the University. Some lectures were particularly challenging. The underlying rationale was that learners were encouraged to attend all lectures, including (or, perhaps, particularly) those of which they knew nothing about the content. In this way, they might extend their range of knowledge and expertise. We were told by some NLA learners that they were not attracted by this rationale, although several participants attended at least 18 lectures out of the 20.

The intention and plan was that each lunchtime lecture would be followed by an additional discussion period, preferably with the lecturer, and preferably in a venue conducive to discussion. Mostly this was not fully achieved during the two terms. It seems that the lecturers were willing enough (feedback from them indicated that they enjoyed this audience) and the demand from NLA learners

for a discussion period was relatively strong. Difficulties seemed to lie over logistics and availability of an appropriate venue near to the lecture-room.

The expertise and high quality of the lecturing of most of the lunchtime lecturers was applauded by almost all NLA learners who gave feedback. The seniority of those who lectured (several professors and/or heads of department) was particularly noted. One respondent wrote

"Lunchtime lectures – excellent. We are privileged to have such high calibre lecturers giving of their time on subjects they are obviously passionate about"

Learning Circles

Learning circles received the most negative comments from NLA learners of all the NLA learning activities. A number of different days, times and locations were tried in the two terms in order to attract a stable attendance. However, apart from a regular representation by members of the LUSSA 'core' group, attendance was sporadic and individuals came and went.

From evaluation interviews it is possible to conclude that there were three conflicting notions of learning circles present in the minds of organisers and learners in the NLA and this limited their effectiveness and caused confusion. The three conflicting notions were i) the format developed in earlier programmes organised for older adults by the Department of Continuing Education of a group which provides a home base and support group for self directed learners interested in different topics; (ii)the second notion was that of a learning group in which to discuss the Monday lunchtime lectures; (iii)the third notion was that of a group in which participants who attended the same Open Lectures could meet to discuss the content of the lectures which they were all attending, including updating any member who might have missed a lecture. There was a possibility of a link with a parallel U3A study group. The evaluation interviews found support for this last notion but not much evidence that learning circles of this nature occurred.

Use of Library and Lancaster University Virtual Learning Environment (LUVLE)

At the end of the Winter term, 13 (38%) out of 34 learners who returned evaluation forms indicated that they "had used the University Library". If this proportion is extrapolated to the whole of the NLA learner enrolment it would signify that a maximum of 56 learners used the University Library. The figure is likely to be an over-estimate, given the size and nature of the original base number.

NLA learners could register with the Library as users and borrow up to three books. In the interviews with students we found learners who, variously, used the Library as a place to sit and study, as a place to read books and learning resources from the shelves and for the purpose of borrowing books relevant to lectures. We interviewed one learner who borrowed books regularly but never the key books recommended by the lecturer in his Open Lecture course. He thought that he should not do this because it would to deny use of a book to a regular undergraduate. Instead, the learner went to the shelves to find books he judged relevant.

Similarly, at the end of the Winter term, 12 learners out of 34 questioned (35%) reported that they used University computer facilities. If extrapolated to the full NLA enrolment, it would mean that 52 learners did so. This, too, is likely to be an over-estimate. Many departments made relevant learning resources available on-line and posted information about undergraduate lecture courses there. The

NLA had a VLE available. We do not have much data to show significant usage of these facilities. Indeed, in the evaluation interviews with NLA learners we found learners who were IT- literate but "did not have the time" (or, possibly, the inclination) to consult departmental learning resources and others who had tried, but failed, to download what they sought.

Encourage access to public lectures, exhibitions, events etc.
The rationale of this project activity was to disseminate information to NLA learners and to encourage attendance at the public lectures and seminars, concerts, theatre, exhibitions and other events which Lancaster University, despite its rural location and campus car-parking problems, makes available to members of the public, as well as members of the University. Public Lectures, seminars and exhibitions are often free of charge.

University public events are normally promoted on the University web-site and sometimes by leaflet and in the press. The NLA made available a notice-board at the Monday lunchtime lectures on which notices of public lectures etc were posted. Little else was done; this activity was not a project priority and we have not collected data on its takeup.

Assistance offered by university departments to U3A group facilitators
This project activity was, arguably, integral to the forging of a strong educational link between the University and the local U3A group. The Lancaster and Morecambe U3A has (March 2010) 59 study and activity groups - more than ten of which have academic/educational objectives which could be matched to the area of expertise of a University department. Some of the U3A study groups are facilitated or 'led'; others are more collective in their approach. One possibility was that facilitators/leaders would value input or assistance from an appropriate contact in a University department.

We know of three enquiries from U3A facilitators/ 'leaders' for assistance from a University department during the two terms of the project's existence. Although the evaluation data is not complete, we do not know that these requests were successfully fulfilled.

In a formal exercise at the end of the project, individual members of the project management committee were individually polled on the relative importance of the project contract objectives. They placed

> *link U3A group convenors with University departments*

as the least important of eight objectives.

C. Benefits to learners and to participating organisations
The interviews and focus groups conducted during the evaluation, the questionnaires analysed and the learner testimonies, records of meetings and other documents examined, speak to the extensive claims made by NLA learners and others on the benefits of the New Learning Adventure to the individuals and organisations participating in it and the evidence which supports those claims.

The claims and evidence cannot be detailed here but will be available in the full Evaluation Report to be made available in late May. The evaluation conclusions on this aspect are summarised in the following two tables.

Table 4: Summary of benefits of NLA for individuals

- access to teaching at university level
- access to university facilities
- new intellectual interests; new study skills
- enhancement of existing intellectual interests
- new friendships
- new experiences
- new confidence

Table 5: Summary of benefits of NLA for organisations

Lancaster University
- A new way of linking with the community
- Older people as research subjects and research assistants
- Older people as active and supportive learners
- Enhancement of university community

Lancaster and Morecambe U3A
- New and different learning opportunities provided for members
- Shown/developed organisational maturity to handle complex external project
- Interested U3A groups nationally in its activities

Lancaster University Senior Students Association
- Continuance of access for members to University learning opportunities
- LUSSA 'core' group has developed skills as key facilitators

D. Costs

An important part of the evaluation was to look at the costs of the NLA scheme in order to make a cost-benefit analysis possible. Marginal cost and full cost models were examined.

There is a real case for costing the NLA on a marginal direct cost basis (see below Model A). The Open Lectures are provided within the mainstream teaching of the University; NLA participants can only attend if there are seats free. Lunchtime lectures incur no direct costs – lecturers provide their services without charge. The University makes no charge for lecture or meeting rooms. The LUSSA 'core' group volunteers, which include several U3A members, provide significant planning and organising time weekly. The Lancaster and Morecambe U3A group also provide significant planning time as well as regular publicity and information about NLA to its members. The administration of the scheme – basically the administration of the Open Lectures scheme – is a direct cost, however. Probably about £1 – £2 K annually at least is required for a member of university administrative clerical/administrative staff to carry it out.

The evaluation also undertook a full (direct) costing of the NLA scheme (Model B). In this model, an estimated proportion of the cost of each lecture was factored in, using the small numbers of NLA learners present at any one lecture course and a median level figure for lecturer salary and on-costs. Lunchtime lecturer costs were added on the ratio of one hour presentation and two hours preparation time. Lecture and seminar rooms hire cost for lunchtime lectures and learning circles were also added in.

Finally, a figure for a full costing of the NLA scheme was calculated, including indirect as well as direct costs (Model C). Indirect costs were calculated using a formulaic approach of 40% of all staff costs. In this model lecture and seminar room hire costs were not included.

Assuming a figure of 150 learners participating in the NLA, the cost per learner of the NLA in the three models was:

Model A   £10
Model B   £320
Model C   £381

E. Sustainability

The evaluation of the NLA showed that it was a well-managed, innovatory project with significant outcomes for learners and is definitely worth sustaining. Minutes of the project management committee show that, from the very beginning, the issue of sustainability was on the agenda. This was particularly necessary because, ironically, it was becoming clear as the project began that the mission of Lancaster University was turning away from lifelong learning and that the future of the Department of Continuing Education was in jeopardy.

However, the NLA project developed robust structures and a momentum as it recruited well and supported successfully a significant cadre of satisfied learners. Plans are now well established for it to continue into 2010 – 2011 with an administrative base in the University relocated to the Centre for Ageing Research within the School of Health and Medicine.

In the evaluation session conducted with the project management committee at the end of the project, members were polled independently with an instrument containing 11 statements about NLA. Only two of the statements drew unanimous assent from all members. One of them was:

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> *"I am certain that the NLA scheme will continue in Lancaster University next year."*

The factors and evidence relating to sustainability of the scheme can be considered under the following headings:

Context

NLA will, in the future, retain a base in a University centre which is sympathetic to its aims and values. It would be easier if the University mission overtly prioritised lifelong learning and if older students

were seen at senior levels as a growing constituency (even market) significant for the future. However, in the absence of such a favourable context, the present situation is sustainable with deft handling

Structures
The key structural features of the NLA proved to be
1) an administrative location in the University
2) a part-time project co-ordinator based in the University
3) the LUSSA 'core' group of volunteer Senior Learner/U3A activists
4) a project management committee with equal representation from the University and the U3A (plus one or two representatives from the LUSSA 'core' group of volunteers)
5) the NLA's existence acknowledged in the L&M U3A structure through reports made to the executive committee and AGM and recognition, as the U3A chairperson put it, of NLA as a "virtual study group".

These structural features were aptly put into place at the beginning of the project. They interacted well together and should sustain the NLA into the future – even if the role of part-time project co-ordinator needs to transmute into something more affordable

Management
Operationally the NLA is a complex scheme seeking to facilitate individual access for a sizeable group of people to a range of learning opportunities across a multi-layered institution. It is not surprising that, in a pilot scheme, some of the learning opportunities were less successful (eg learning circles) or less well developed (eg links between U3A group convenors and University departments) than others. Communication with learners was sometimes late, sometimes too frequent (some of the NLA learners interviewed described the scheme as being in danger of being "buried in paper"). Nevertheless, at the end of the project the other statement to which members of the project management committee gave unanimous assent was:

> *"We managed the NLA scheme well"*

The evaluation suggests that the statement can be justified in terms of energetic and responsive management styles, appropriate sharing of responsibility between paid staff and unpaid volunteers and good communication and mutual respect between the principal project partners. These features will continue to be necessary for the future sustainability of NLA.

Costs and benefits
Costs and benefits have been discussed above in Section 2.5. With Model A, on a marginal direct cost basis, NLA is sustainable even if it means charging learners an annual fee of, say, £10 with a small regular attendance fee.

Values
What will matter for future sustainability is that the values of the University-based and U3A co - partners remain similar or, at least, complementary in the context of the project. The necessary shared values of the co-partners will be a belief in later life learning, an acceptance of the legitimacy

of both the U3A and the University approaches to learning, and a recognition that, in learning, individual older adults need to be self-directed and free to find the learning pathway which suits them and their life situation

F. Dissemination and roll-out

There is clear evidence of active and effective dissemination of the NLA by the project partners, even during the lifetime of the project. At the U3A national conference in September 2009, mention was twice made of the project. The project co-ordinator gave presentations on NLA at national conferences in February (London) and March (Oxford) 2010. Papers on the evaluation are expected to appear later, and further conference presentations given. It was clear from the evaluation interviews conducted with members of the project management group that they placed a premium upon planning, and carrying out, effective dissemination. Indeed, they regarded as a prime responsibility the project contract objective of running the NLA as a "demonstration model" which would be evaluated substantially and then disseminated on a national basis.

It followed that planning of the project Conference (March 24th 2010), and of the Learning Day which preceded it, began at an early stage. The programme of the conference (held at Lancaster University) was coherent and well-structured, combining addresses by national figures, witness accounts of the NLA, an interim presentation on the project evaluation and discussion groups. Feedback from participants on all parts of the programme was very positive indeed. 48 participants attended, representing 13 U3A groups in England, Scotland and Wales (not including Lancaster and Morecambe) and three universities (not including Lancaster). Asked *to what extent did the conference meet your expectations?* the following replies, among many similar, were made:

> *"It exceeded my expectations. It was very good to hear how this project has been rolled out and evaluated."*

> *"Very well. A very good conference with good speakers, humour and friendliness"*

> *"A useful opportunity to reflect on an important project, it met my expectations and was thought provoking."*

The Learning Day was hosted by the Lancaster and Morecambe U3A in the Lancaster city centre on the morning of March 23. It moved to the University campus, three miles away, in the afternoon. It was planned as a "demonstration model" (for non NLA members of the L&M U3A group and early arrivals for the Project conference). There was an attendance of about 129. The programme contained lectures by the most popular of the NLA lunchtime lecturers and a range of seminars/workshops conducted by University postgraduates to demonstrate the width and the depth of University research excellence and how it could be accessible to U3A members. The following positive comments about the Learning Day, among many, were received as feedback:

> *"A very entertaining day! I learned a lot from the seminars and lectures, and was introduced to another benefit of belonging to U3A."*

"What a wealth of information is contained in universities and not available to the outside academic world."

"Opportunity to find out about new research that will be of benefit to society in future. Gained a feeling of optimism that the younger generation will take care of the world!"

"Appreciated the interaction with members of other U3A groups, especially regarding the link with University of Lancaster."

With regard to the possible roll-out of the NLA model to universities and U3As around the country, a range of enthusiastic comments were made in the feedback on the project Conference (evidently from representatives of other U3A groups attending). For example:

"Encourage(d) me to pursue links with university."

"Brought the opportunity of linking with a university to the fore."

"Food for thought to take back to […] region."

"Will stimulate U3A thinking as how to link with universities"

"I have been given good advice on how to get started in my area, how to approach a University and lessons learned during the project"

Indeed, in order to effect a roll-out of the scheme and to disseminate *good advice* and *lesson*s *learned*, the NLA project partners are, in the post-conference period, putting finishing touches to the 'How-to' Guide for organisations (U3A groups and universities) which wish to replicate all or parts of NLA.

Part 3. In Summary

A. Project contract objectives
The achievement or otherwise of project contract objectives was the formal focus of the Evaluation. Table 6 summarises that achievement based on evaluation data.

During the course of the project, the project management committee formed the view that not all of the contract objectives were of equal importance. In the formal exercise conducted at the end of the project, individual polling of each member of the committee showed that the following three contract objectives were agreed to be of most importance:

- access University learning for U3A members
- develop a sustainable link between Lancaster University and the Lancaster and Morecambe U3A group
- set up a demonstration model

Members of the committee were evenly split on whether *"we should have been clearer about the key aims of the NLA scheme from the beginning"*.

Table 6: Achievement of project contract objectives

Contract Objective	Achieved?	Comment
i) set up a demonstration model	Yes	
ii) access University learning for U3A members	Yes	
iii) information, advice and guidance on course choice for U3A members	Yes	Available but not much used
iv) run structured learning circles	Yes - attempts made No – limited success	See discussion at 2/2 (iii) above
v) develop a sustainable link between Lancaster University and the Lancaster and Morecambe U3A group	Yes	See discussion at 2/5 above
vi) make links between U3A groups and University departments.	No	See discussion at 2/2 (vi) above
vii) disseminate lessons learned	Yes	See discussion at 2/6 above
viii) set up an information, advice and guidance facility for other universities and U3As	Yes	Yet to be fully realised but see discussion at 2/6 above

B. Project work plan numerical targets

During the early part of the project, the lead partner (Lancaster University Department of Continuing Education) was required by NIACE, the managing agent of projects funded through the Transformation Fund, to submit a work plan, containing *inter alia*, numerical targets. Table 7 identifies those targets and summarises the performance of the NLA project against them.

Table 7: Achievement of project workplan numerical targets

Target	Number/%	Achieved?	Comment
learners new to U3A &/or 'academic' learning	10%	Yes	Data on background of NLA learners (see Table 1) show few, if any, new to 'academic' learning, but 13 per cent new to L&M U3A.
participation in lunchtime lectures/ discussions	80	Close (78).	Yes - mean attendance per lecture was 31, 78 participants in total attended lunchtime lectures and discussions.
participation in one or more Open Lectures	50	Yes	See Table 2
learners receive information pack	150	Yes	
attendance at an information day	100	Yes	
participation in a learning circle	25	?	Definite count not available. Probably around 20. But see discussion at 2/2 (iii) above
attendance at a Library/ISS information session	100	Yes	But see 2/2 (iv) on usage
given access to library cards and ISS facilities	80	Yes	But see 2/2 (iv) on usage
attend University public lectures and seminars	30	Not known	See 2/2 (v)
U3A group leaders assisted by University dept.	5	No	See 2/2 (vi)

C. Learning outcomes

Planned learning outcomes

1. U3A learners were stimulated and given new horizons by university teaching not otherwise accessible to them in subjects/topics of existing interest to them

2. U3A learners were stimulated and given new horizons by university teaching not otherwise accessible to them in subjects/topics new to them
3. U3A learners were encouraged to new critical reflection upon subjects/topics of interest to them
4. U3A learners were challenged intellectually
5. U3A learners were able to take to gain new insights into subjects/topics central to the interests of a U3A study group and to return to the group with those insights.
6. U3A learners enjoyed university learning
7. U3A learners gained new confidence in study skills at higher education level.

All of the above took place in the NLA project and can be evidenced from evaluation data.

Unplanned learning outcomes
1. Intergenerational learning took place between U3A learners and undergraduates 18/19 years
2. U3A learners were stimulated to learn by the international and cosmopolitan nature of the University campus student body
3. Lecturers invited U3A learners into their seminars to share life experience and because of their willingness to take part in discussion
4. Lecturers invited U3A to participate in research as the objects of research
5. Academic departments invited U3A learners to participate in research as lay advisers and as fieldworkers
6. A few U3A learners said that "at last" they had studied in a university

All of the above took place in the NLA project and can be evidenced from evaluation data.

D. Innovation and lessons learned

We believe that the whole of the New Learning Adventure was innovatory in that such a scheme of co-operation has not been attempted successfully before by a UK university and its local U3A group. The development of range of university learning opportunities, which could be taken in whole or in part by U3A learners, was new in its coherence and variety in British later life learning. The role played by volunteer senior learners was innovatory. We believe that the development of strategies for sustainability, dissemination and roll-out from the start of the project, if not in themselves new, combined with all the development aspects of the project to show an ambition that is new.

And that ambition is that UK universities should now change and open their doors more emphatically to older learners. This evaluation report shows that a successful model for opening those doors was developed in Lancaster between September 2009 and March 2010. Many lessons were learned from the experience of the New Learning Adventure scheme financed by the Transformation Fund. They are to be found in the *New Learning Adventure 'How-to' Guide*.

Section Three: Case Studies/Learner Stories

The following case studies are designed to give a flavour of participants' experiences.

'Jane', aged 52

In July 2008 'Jane' retired as a primary school teacher. Over the past few years she has attended a number of courses run by the Department of Continuing Education; the most recent being 'Chinese Culture and Language'- a week's course held in the summer of 2008. It was because of her enrolment on those courses that she was invited to go to a one day conference on learning and older people at Lancaster University in April 2009. Following on from that she received a schedule of the afternoon lectures and workshops for older people starting in September 2009, the New Learning Adventure programme. More out of curiosity than anything else she decided to go along and try them out. She was immediately struck by the range of subjects discussed, and she particularly enjoyed the group tasks set by many of the speakers. It enabled her to get to know, a little better, the group who had formed strong bonds since its inception some time before. When it was hinted that the Senior Learners may have to become more 'self-sufficient' in their organisation and a request was put out for offers of help, she found herself saying she could lend a hand.

Since September 2009 she has been part of the LUSSA 'core' group, attended Open Lectures and been a delegate at the Universities UK conference in London. Due to clashes with her lecture times she was unable to be at any of the Learning Circles. She says:

"I expect I was thought of as the group member with the loudest voice, resulting in me introducing the speakers at our lunchtime lectures! In the process of doing the research on lecturers I've learnt new things, often by accident. The Open Lectures have rekindled an interest in language and literature which had been buried under the pressures of motherhood and continuing teaching. I have come into contact with people who have fascinating life experiences and are role models for Active Ageing. My involvement has provided structure and stimulation akin to that which I enjoyed in my professional life, before retirement. It has filled a gap which I didn't realise existed. I intend to continue with the Open Lectures and may try to sit in on second year courses."

'Jackie', aged 66

Jackie has been in the U3A for many years and had been active in several groups on and off. She'd heard about the New Learning Adventure through the U3A and had immediately expressed her interest in being part of the scheme. Jackie had never studied at University so was excited by the prospect of being able to sit in on Undergraduate lectures.

In the first term she'd had two lectures a week so it was quite a commitment on her part but it was a commitment she absolutely relished. In fact, after just one lecture she felt that she would have changed her work practice had she known this stuff years ago. She regretted not having had the opportunity to study these topics earlier. She also regretted not being able to attend the seminars because she felt that's where the real leaning would have taken place. There were four senior learners doing the same course as Jackie and she had hoped they would be able to have their own seminar immediately after the lectures. However, time constraints prevented this from happening. The course lecturer had offered the four senior students an opportunity to meet with him separately

at the end of the first term as he felt having time to discuss issues raised through the lectures was crucially important. Jackie had found the lectures fascinating and invested in a lot of books to follow up her interests.

'Stephen', aged 69

Stephen had been an active member of the U3A for over 2 years. He'd found that being involved in the U3A had given him the opportunity to deepen his understanding of things he'd always been interested in but not had time for, particularly around science and technology. He'd heard about the New Learning Adventure through the U3A and was interested in joining the scheme because he'd never been to University as a young person and was keen to have the experience of learning at this level at this point in his life. In his own words, *"because people have retired, it doesn't make them stagnant!"*

Stephen attended the lunchtime lectures and had found them absolutely fascinating. In particular, he'd been so enthused by the lecture on volcanoes that he'd started to do his own research and was thinking of taking a holiday in Sicily so that he could visit Mount Etna for himself. He'd become so interested that he said if he'd been 40 years younger he'd have enrolled to study volcanoes as an undergraduate.

'Mary' aged 54

Mary had been a senior learner at the University for a number of years and had heard about the New Learning Adventure through the Open Day at the University. She'd signed up for the lunchtime lectures and had been to almost every one: *"Because of my own personal circumstances to do with recovering from illness, I'm very keen on trying to re-stimulate the brain and something like sitting for an hour's lecture is a good way of learning to focus after many years of illness."*

Mary had enjoyed turning up to lectures without having to prepare or do any subsequent work following them. She found the lectures fascinating, even though some of them were on subjects she didn't think she would have been interested in. Mary felt that coming to lectures had made her feel better about herself. *"I've increased my capability since I've been coming here. Being able to focus and listen was a huge challenge but by being able to come to things like this has meant I've retrained my brain to learn to focus. From a rehabilitation point of view, it's been fantastic".*

A three-point summary of our learning from this project

- That older people have a lot to offer to a university.

- That older people are willing to put time in as volunteers – to take responsibility for their own programme and to be self-sustaning while understanding the importance of reporting to key contacts.

- That there is a willingness within the academic community within a university to listen to and engage with older people, and that there are benefits to be gained by both sides when this happens.

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