# New Learning Adventure for Third Agers

How-to Guide

How to set up a joint learning programme between a University of the Third Age (U3A) branch and a university.

This guide is based on the New Learning Adventure for Third Agers programme that was set up in partnership by Lancaster University, Lancaster and Morecambe U3A and the Lancaster University Senior Students Association. It was funded by the Learning Revolution Transformation Fund.

May 2010
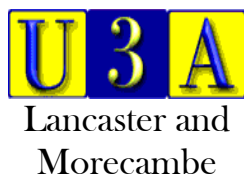
Contact details to end July 2010:

Department of Continuing Education
Lancaster University
Ash House
Lancaster
LA1 4YT

http://www.lancaster.ac.uk/depts/conted/index.htm
Tel 01524 592623
Email conted@lancaster.ac.uk

Contact details from August 2010:

Continuing Learning Group
Centre for Ageing Research
School of Health and Medicine
Bowland Tower East
Lancaster University
Lancaster
LA1 4YT

http://www.lancs.ac.uk/shm/research/C4AR/olderLearners.php
Tel 01524 592127
Email c4ar@lancaster.ac.uk

Foreword

This guide is intended to be a helpful, easy to use resource for any U3A branch or university that is thinking about setting up a partnership learning programme similar to the New Learning Adventure for Third Agers (NLA). Our conference in March 2010 highlighted the interest that U3As have in developing partnerships with universities, and feedback from participants suggested that a guide such as this would be useful.

Through the NLA programme we aimed to enhance and expand the learning opportunities that were currently available to members of Lancaster and Morecambe U3A by opening up the expertise and facilities of Lancaster University. We wanted to establish how such a programme could be delivered at low cost and ensure that the programme could continue after the initial external funding had finished.

The New Learning Adventure was funded by the BIS (Business, Industry and Skills) Transformation Fund. The Transformation Fund was established to deliver on commitments made in The Government's Learning Revolution White Paper which was published in March 2009. The fund encouraged new partnerships between public, private and community organisations and supported a range of projects across the UK, all of which were concerned with developing innovative adult learning initiatives for the benefit of communities and individuals.

A summary of the NLA programme is available on the Department of Continuing Education website (see previous page), and this complements the information provided in this guide. This guide has been co-written by staff from the Department of Continuing Education at Lancaster University who managed the programme, and students from Lancaster University Senior Students Association (LUSSA) who acted as a very proactive volunteer group to support it and who commented:

"In order to create and deliver an educational environment such as the New Learning Adventure, we feel it requires a unique chemistry involving three elements. Firstly, a forward thinking, proactive educational institution which values the ethos of continued learning and furthermore is prepared to facilitate it; secondly individuals from within that educational institution who are prepared to foster and embrace the concept, and thirdly, but perhaps most importantly, links to a group of local older people who are prepared to volunteer their time in order to make sure the programme works."

We hope that you find this chemistry within your own area, and we wish you every success in setting up your own programme.

Lucy Lloyd
Assistant Director, Department of Continuing Education, Lancaster University
May 2010

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Appendices

1. Acronyms and Partners

We have tried to avoid using jargon in this guide, however we have used the following acronyms throughout the guide.

DCE – the Department of Continuing Education at Lancaster University, lead partner in the programme with experience over many years of making high quality and innovative educational provision for older adults and an international reputation for its research in this field. Due to financial and strategic factors the Department will close at the end of July 2010.

During the NLA, DCE employed a Senior Development Officer (Fiona Frank) for two days a week to co-ordinate the programme. Fiona had co-ordinated the Senior Learners' Programme for the previous two years. She managed the different elements of the NLA project, acted as secretary and convenor of the management and volunteer groups, and oversaw project communications. She was supported by administrative staff in the department. A considerable amount of commitment, energy and drive is needed in the early stages to get such a programme off the ground and lead it forward so successfully.

NLA – New Learning Adventure for Third Agers, the programme we ran consisted of a number of elements which are described in the next section.

LUSSA – the Lancaster University Senior Students Association was one of the three partners in this programme. DCE ran a programme called the Senior Learners' Programme between 2006-2009, and participants in this programme set up their own Lancaster University Student Union society. The senior learners supported DCE during a difficult review period in 2008 and in particular championed the learning/research circle concept. Along with other volunteer older people, they piloted the Open Lecture programme in spring 2009, and volunteered to assist in running the NLA programme in the autumn.

For further information about the senior learners, please see Appendix A.

U3A – Lancaster and Morecambe University of the Third Age was one of the three partners in this programme. This successful and vibrant U3A currently has over 700 members and offers around 30 different special interest groups.

http://www.lancasterandmorecambeu3a.org.uk/

Nationally, the U3A has over 760 branches and over 24700 members. The U3A Research Committee's interests include investigating the benefits that learning throughout life can provide to individuals and to society.

http://u3a.org.uk/

2. Overview

The New Learning Adventure (NLA) built on previous work that the Department of Continuing Education (DCE) had done with older learners over many years. In particular in the three years prior to the NLA programme DCE had run a Senior Learners' Programme for over 100 local adults; this programme had included short courses, lectures, a research circle, and access to university library and IT facilities. DCE had also run Lancaster University's long-standing Open Lecture scheme which enabled members of the public to sit in on undergraduate lectures.

In the NLA programme, the Department of Continuing Education linked up with two partners: Lancaster and Morecambe U3A and the Lancaster University Senior Students Association (LUSSA). LUSSA is the student society that was formed by participants in the above mentioned Senior Learners' Programme. Members of LUSSA along with other older learners took part in a pilot Open Lecture programme in the spring and summer of 2009 and were therefore well-placed to assist in the running of the NLA programme and support new learners. They became known as the "Core Group" of senior learners.

We received £25,500 funding from the BIS (Business, Industry and Skills) Transformation Fund for the Learning Revolution to run the NLA programme for Lancaster and Morecambe U3A members over 7 months from August 2009 to March 2010.

The programme included:
- Access to undergraduate lectures (Open Lectures)
- Lunchtime lectures from university academics with discussion afterwards – these were organised specially for this programme
- Self-facilitated Learning Circles
- Use of the university library and IT facilities, including free access to the virtual learning environment, email and internet, and use of computers
- Access to public lectures and seminars organised by other university departments
- Facilitating links between a small number of U3A group leaders and relevant academics

149 people participated in different elements of the New learning Adventure, with 56 individuals taking part in the Open Lecture programme.

See also the section below on Funding and Costs, page 11.

Through this programme we aimed to:

- enhance and expand the learning opportunities and experiences of Lancaster and Morecambe U3A members
- work out how such a programme could be delivered at low cost
- establish a means for the programme to continue after the initial external funding had finished
- evaluate how the programme had worked and disseminate the findings to others across the UK who might want to set up a similar programme

Project report

A report containing details of the programme and a summary of the findings of the evaluation is available on the DCE and Continuing Learning Group (Centre for Ageing Research) websites, along with this guide – see front of guide for details.

3. First contacts

For universities seeking to meet their local U3A, and for U3As seeing to meet their local university.

Who to contact in U3As

It is relatively easy for a university to make contact formally with the local U3A branch or branches via either the Chair or the Secretary. The national U3A website (see below) is a good starting point as it gives details for most branches.

http://www.u3a.org.uk/

All U3A branches are different in size, structure and the activities they offer. If you are already running activities for older learners, or if you have older learners on your undergraduate or postgraduate programmes, then it's very likely that you will already have U3A members among your learners, and this could be a good starting point for you to make first contact.

Who to contact in universities

It can be difficult for U3As to find the right person to speak to in a university. Like U3As, all universities differ in size and structure, but also in their mission and regional involvement. If you have more than one university near your U3A then it is worth familiarising yourself with each of them before contacting them, so that you can gauge which is more likely to provide the partnership you want. All universities have extensive websites and this is a good place to start your research.

If the University has a Continuing Education Department, Lifelong Learning or Widening Participation section, this will be a good contact point as traditionally these are the sections that offer non-degree learning opportunities for adults. You might also contact other sections that have programmes that are aimed at the general public – for example there is usually a public arts section that offers lectures, concerts, exhibitions and seminars. The above sections may have a specific remit to work with adults in the local community.

Alternatively there may be a section of an Education or Health Studies Department that has a particular interest in older people. If so, then making a contact will be about finding a member of staff with a particular interest in the partnership you are offering.

You might find that the first person you contact is not interested. Don't let that put you off! Universities tend to be quite diverse places, and what doesn't interest one person or section may well interest another a great deal – it's simply a case of finding the right person to ask. It is useful to have some demographics up your

sleeve, to remind the University of the importance of working with local older people. You can find some useful information in a report prepared by Professor Chris Phillipson for Universities UK in 2010, "Active ageing and universities: engaging older learners". A free download is available from:

http://www.universitiesuk.ac.uk/Publications/Pages/ActiveAgeing.aspx

TOP TIP

Our best tip for making contact with a university came from a U3A delegate at our end of project conference in March 2010: *"Lots of U3A members used to work at the university. They'll tell you who to contact."*

4. The Proposition

Your initial contact with a university or U3A will be concerned with exploring mutual interests and what each partner can offer, so it is useful to be clear what your organisation wants and what it can offer before you start discussions.

Participants in our programme identified the following benefits which each partner might bring to the partnership.

What might a university partner offer?
- Access to undergraduate teaching via an Open Lecture scheme, or similar
- Talks from and discussions with experts in a very wide range of subjects (occasionally this resulted in further correspondence between learners and lecturers after the lecture)
- Opportunities to hear about and even get involved in cutting edge research
- Access to a superb modern learning environment and facilities such as the library, IT, and sports centre
- The possibility to enhance and expand learning opportunities available via the U3A – this might attract a new members to the U3A
- Unexpected benefits such as getting a student card that entitles learners to discounts with local retailers, IT and mobile phone suppliers and restaurants
- Access to social activities such as arts events and trips
- Office space for volunteers involved in running the programme and storage space

What might a U3A partner offer?
- A group of receptive and enquiring adults who will widen the demographics of the student base for lectures and seminars
- Easy access to willing volunteers to participate in research and other academic activity, helping the university to fulfil funding requirements for user engagement
- An encouraging and interested audience of adults for those with little experience in lecturing or delivering a seminar
- Easy access to members of the community who are keen to be involved with their local university in different ways. Some might be willing, for example, to provide a temporary home for overseas students during holiday periods, or to train as student mentors.
- Access to the wider U3A membership

5. Funding and costs

The following main costs were associated with the New Learning Adventure:
- Staffing – Management, Co-ordination, Administration, Learner support
- Delivery of activities
- Promotion
- Office costs - telephone, photocopying, computer, postage, etc
- Evaluation and dissemination

Phase One

The New Learning Adventure received £25,500 funding from the BIS (Business, Industry and Skills) Transformation Fund for the Learning Revolution over 7 months from August 2009 to March 2010.

Overall responsibility for the programme lay with a named member of staff in DCE, who was supported by a Management Group consisting of three Lancaster and Morecambe U3A members, two DCE staff, and one Lancaster University Senior Students Association volunteer. The external funding paid for the co-ordinator for two days per week in DCE, and other direct costs such as evaluation and dissemination.

As lead partner, staff in DCE managed the budget and handled the programme's finances through its existing procedures. They also liaised with the funder and wrote necessary reports.

Administrative support was provided by the Department of Continuing Education (equivalent to £10,500) and a significant amount of additional time was supplied on a voluntary basis by our partners, Lancaster and Morecambe U3A and, in particular, members of Lancaster University Senior Students Association and other older learner volunteers (equivalent to £6,000). Our partners assisted with promotion via their existing U3A newsletter and dissemination, and provided learner support along with the co-ordinator.

We did not charge a fee to learners while the project was receiving external funding. We sought to link our programme into existing learning activities that would incur no direct additional cost to the University (see below).

Future model at Lancaster

From August 2010 the NLA programme will transfer from the Department of Continuing Education at Lancaster University, which is closing in summer 2010, to the new Centre for Ageing Research (C4AR) at Lancaster University. We anticipate that in its second year the project will not require further external funding and will operate along the following lines:

- Overall responsibility for the programme's finances and accountability will remain with the University via the Centre for Ageing Research.
- A new Steering Group, made up of volunteers from the Lancaster University Senior Students Association and the former NLA Management Group, will assume responsibility for running the programme, including most of the programme's administration.
- The University will provide a few hours of administrative support per week on average which will be "bunched" at the start of the autumn and spring terms.
- A small fee will be introduced for learners and this will cover the University's administrative and office costs.
- The Steering Group will decide how much evaluation and dissemination work is desirable and feasible.
- The group has a commitment to continuing to explore, develop and support common and individual research interests.

This model depends on the programme continuing to link into existing learning activities that will incur no direct additional cost to the University (see below).

Learner fees

During the New Learning Adventure, because our costs were subsidised by external funding, no charge was made for the activities. In 2010/11 the Steering Group plan to introduce a small administrative fee of £10 - £20 to cover the University's administrative and office costs. They are also considering a "pay as you go" fee system (£1 or £2 per lecture for example), which will cover additional costs e.g. attendance by members of the Steering Group at relevant courses and conferences, and will enable the group to support specific projects. They will continue to look further suitable external funding.

Occasionally the Students Association organises social events, such as a theatre trip, and they charged a fee to cover costs. This arrangement is likely to continue.

Cost of activities

Of the six elements that formed the New Learning Adventure, only one incurred additional direct cost for the University. When we engaged PhD students to deliver lectures this was on a paid for basis as PhD students are not salaried staff and are paid by the hour for any teaching they do. The hourly fee for teaching by PhD students is set by the Human Resources Office.

It is however worth acknowledging the kinds of costs that are involved in delivering these kinds of activities and that a university might wish to take into account:
- Departmental academic staff (Open Lectures, Lunchtime Lectures and discussions, talking to group leaders, departmental public lectures and seminars)
- Departmental administrative staff (liaising over Open Lecture availability and access)

- Use of rooms (Lunchtime Lectures and discussions, meetings, learning circles)
- Access to and support for use of library
- Access to and support for use of Virtual Learning Environment
- Central overheads (central administrative services such as Finance and Human Resources, and estates costs such as lighting, electricity, heating and building maintenance)
- Office costs (such as photocopying, small amounts of stationery and post)

Some universities might take the view that not only is there a cost involved in the use of staff time to effectively subsidise this kind of programme, but that there is also a lost opportunity cost when staff are not using their time for activities that generate income. If that view was taken then some attempt might be made either to cover costs through external funding or fees to learners, or a combination of these.

We would suggest that it is reasonable for a university to waive such costs in view of the benefit that it gains from its partnership with the U3A. After all, there is a cost benefit to the University in using U3A volunteers in its research and other activities, as well as the wider social and health benefits of such activities to individuals and society.

External funding

As is quite often the case, the funding stream we bid into (BIS Transformation Fund for the Learning Revolution) was a one-off and is no longer available. However, there is usually a wide range of short term funding opportunities for partnership programmes of this kind that support new projects in the early stages. "Third Sector" and voluntary organisations are often the targets for such funding. Universities are very used to identifying and writing proposals for external funding and usually have a central support office.

We recommend the following on-line resources for identifying external funding possibilities:

http://www.fundingcentral.org.uk/

http://www.grantsonline.org.uk/

A NOTE OF CAUTION!

Putting together funding bids is time-consuming and if you are successful the funding will come with strings – usually there are stringent monitoring, reporting, budgeting and evaluation requirements. If the funding is reasonably substantial then you can appoint a co-ordinator to set up the programme and run it for you in the first year or so. However, if the funding doesn't allow for this then you may find that you are simply adding to your workload for little gain.

6. Getting started

There are a small number of aspects of the programme that it is important to put in place right at the start. You will benefit later from time spent on these features at the outset.

- Agree how the project is going to be managed

- Agree priorities and any targets/objectives

- Allocate roles and responsibilities (see the next section)

- Establish a schedule of meetings, involving partners as appropriate – make sure you allow plenty of time, especially in the early stages

- Agree how partners will communicate with each other (see below)

- Work out a schedule of activities and identify any key deadlines

- Build in time to review progress and evaluate activities

PERSEVERENCE PAYS!

As we said previously in this guide, sometimes the answer you get depends on who you ask. So if at first you don't get the answer you want, it's perfectly reasonable to find someone else and ask again, while mentioning that you have already spoken to "X", but that what you were asking didn't seem to be within their area of interest or expertise.

Communication

Those involved in running the project will need to work out how best to communicate with each other. University staff may find email most convenient, but other partners may prefer phone, postal or in person communication – older people are less likely to have access to email or their own computers at home. If you decide to use email check out whether all the partners can receive attachments and what format of files works best for them. We had regular monthly meetings for both the Management Group and the LUSSA volunteers and these were essential in keeping everyone involved and up to date with developments.

We found that post was the best way of communicating with learners once they had registered for the programme. With other forms of communication, such as email, there was always the possibility of some learners not receiving the information.

However, lack of forward planning sometimes meant that at key times we sent several mailings to learners about registration and different aspects of the programme, and understandably some learners found this irritating.

We also put information in the U3A newsletter which was given out in person to anyone attending the monthly meeting and posted to anyone who did not attend. It took a bit of forward planning to get information ready in time for the deadline, but had the advantage of underlining that this was a joint programme.

See below also the section on Issues under Open Lectures, page 20.

TIP

Universities – introduce yourself to the editor of your local U3A monthly magazine, and their webmaster/mistress. They will help you to get information out regularly and easily to a large number of people.

7. Roles and responsibilities

We identified the following main roles and responsibilities (below). While the programme was funded most of these were carried out by the programme co-ordinator, with the invaluable help of our LUSSA volunteers. As the programme continues, these roles will be taken up mainly by volunteers from both partners, with some administrative support from the University.

It is worth reiterating here the key role that our project co-ordinator, Fiona Frank, played in orchestrating the whole programme, drawing in academics and other University staff, and capitalising on the enthusiasm and willingness of the LUSSA volunteers to contribute their time and efforts to the programme. The programme benefited enormously from her vision and enterprise.

A small amount of office space and storage space is needed at the University for those who are carrying out these roles, and access to photocopying and mail services. Of course these aren't discrete areas of responsibility and a great deal of liaison between those involved is needed, as well as a clear and realistic schedule.

In the next section we will provide more detail about the tasks associated with different elements of the programme.

- **Management**

Managing the budget
Reporting to external funders and/or university senior managers
Ensuring agreed objectives are met and progress is reviewed
Ensuring schedule of activities is on track
Chairing meetings
Ensuring partners' interests are represented

- **Programme co-ordination**

Planning and scheduling the programme's activities
Booking lecturers for talks and discussions
Hosting lectures - introducing and thanking lecturers, facilitating discussion

- **Marketing and communication**

Promoting the scheme and recruiting learners
Providing information for U3A newsletters
Producing a programme newsletter for learners – perhaps each term
Providing information to learners about changes to the programme or new opportunities

- **Administration**

Working out the administrative support needed for the different activities
Developing a clear and realistic schedule for running the programme
Providing main contact point for learners, university staff and partners
Setting up systems for registering learners
Liaising with University departments over Open Lectures
Providing detailed information to learners about what is happening, when and where
Liaising with the University library and other facilities over access for learners
Sorting out logistical problems
Booking rooms and refreshments
Ensuring appropriate provision is made for disabled learners
Mailings

- **Learner support**

Organising introduction sessions for new learners – e.g. finding your way around the university, using the library, using IT systems
Meeting and greeting new learners – befriending and helping
Facilitating learning circles

- **IT support**

Setting up and maintaining a programme website
Administering virtual learning site
Liaising with the university over use of IT facilities
Trouble shooting

8. Programme activities

The following pages describe the main administrative tasks associated with each of the activities that were offered in the NLA programme.

Initial programme promotion and registration
The programme was promoted in the August U3A newsletter, and included a reply slip for individuals to register their interest and an invitation to attend one of two information days that we held at the University in September. We also attended the U3A Annual General Meeting in late August to talk to members about the NLA programme.

Whether or not individuals had attended an information day, we asked all who wanted to take part in the programme to formally enrol by the third week in September and to indicate which, if any, Open Lectures they wished to take. From a membership of Lancaster and Morecambe U3A of around 700 people, 115 people registered their interest in the programme. A further 34 people from other local U3As and/or who had taken part in previous programmes for senior learners also registered.

A sample reply slip and enrolment form are included in Appendices B and C. Some of the questions on the enrolment form were required by our funders.

Too much choice!
One problem for participants was how to balance their interest in the different activities we were offering with the amount of time they had available. To take part in all the activities would have meant coming to campus at least twice a week for most people. There were inevitably some clashes too, between Open Lectures and the programmes' Monday lunchtime and afternoon activities.

8.1 Programme activities: Open Lectures

Establishing lecture availability

In July we obtained a list of the first year undergraduate lectures that would be offered in the autumn term. We obtained the list from the person in the University who is responsible for timetabling the lectures. It is important at this stage to have the dates, times and location of lectures. The lectures start from the first full week in October.

We removed from this list any lectures that we knew from previous experience would not be open to the public; these included social work and lab-based courses. Then we contacted the secretary in each of the University departments to check whether there would be room in the lecture theatre or teaching room to take additional students. At Lancaster University many courses use all the available seating in their allocated rooms. Unfortunately this means that places tend not to be available on popular courses such as English and History in the autumn, although due to drop out places can become available in the spring term.

Informing participants

This list was made available to all those who expressed an interest in the programme, either at the information days or by post. We did not include the lecture venue in the initial list. As stated above, individuals indicated which if any Open Lectures they wished to take when they enrolled for the programme by the third week in September. We asked learners to indicate second and third choice of lectures as we assumed some courses would be oversubscribed. This gave us two weeks before term started to allocate places and confirm details to learners. We allocated places randomly to all those who enrolled before the deadline.

Of the 149 people who enrolled for the programme, 56 signed up to take one or more Open Lecture.

Open Lecture protocol and limiting numbers

We set a self-imposed limit of 5 people per lecture as we did not want the NLA learners to be too prominent among undergraduates, who after all were paying a great deal more for their place on the course. We provided learners with an Open Lecture Protocol Sheet (see back of guide), as we were concerned that they might dominate the lecturers' time by asking lots of questions but we need not have worried. The feedback from lecturers was excellent - without exception those who gave feedback welcomed the addition of older learners to their lectures.

We contacted departmental secretaries again just before the start of term to let them have names of those who would be attending. At this point we _should_ have arranged with the secretary for NLA learners to have access to any reading lists and

the course virtual learning site. By term two we had realised how much easier it would be to do this at the very start of term!

Second and third terms

For the spring term we started this process again in November, with enrolment for Open Lectures by early December and allocation of places taking place before the Christmas break. At Lancaster University virtually no new series of undergraduate lectures start in the summer term, although a few series that started in the autumn and winter terms continued for either 5 or 10 weeks in the summer term.

When do lectures take place?

There was a very wide choice of undergraduate lectures and the scheduling of them varied. Some took place for one hour per week over one or two terms (10 or 20 weeks), while others had two lectures in each week that were on different days with different lecturers. Others had up to 3 lectures per week but only ran for 5 weeks with one lecturer. The scheduling varied considerably meaning that some learners, who also wanted to attend the Monday Lunchtime Lectures and Learning Circle had to come to the University several times each week while their Open Lecture was running.

Issues

Occasionally lectures are cancelled or moved due to the lecturer being absent or a problem with the room. For various internal administrative reasons, our students were not registered for their Open Lecture courses on the University's student records system and this meant that they did not receive emails send out by the course secretary to registered students, nor did they have automatic access to materials housed on the Virtual learning Environment (VLE).

Some secretaries/lecturers remembered about the senior learners and contacted them separately. Also, when known in advance, changes to lecture times and venues tend to be read out in the previous week's lecture.

However we did have a small number of instances of learners travelling to campus only to find that their lecture had been cancelled or moved and of course this was very frustrating for them. On one occasion this was because the department did not have contact details for the senior learner.

WITH HINDSIGHT!

It would have been much better to register the learners on the University's central student records system from the outset.

8.2   Programme activities: Lunchtime Lectures and discussions

Contacting Departments

Some weeks in advance of the autumn term we contacted Heads of Department via an email list supplied by the Human Resources office, inviting them to become involved in the NLA programme and to give a lunchtime lecture for the group (or nominate a colleague/s). We had a very encouraging response to this email and had more offers to deliver lectures than we had slots available form Heads of Department, research and teaching staff and PhD students. Only PhD students were paid, at an hourly rate set by the Human Resources office.

Format

The Lunchtime Lectures followed a format we had used successfully previously, with a regular Monday lunchtime lecture 12 – 1pm or 1 – 2pm, with time for questions, and then discussion afterwards for which we encouraged lecturers to stay. The discussions were preferred when the lecturer could attend, but of course some had other commitments and could not stay.

Learners did not have to enrol for the lectures but could simply come along on the day. Attendance varied from around 30 – 45 learners per week, with around 70 people in total coming to one or more lecture. Most people chose to come only to subjects that they thought would interest them, but as one of our LUSSA volunteers said:

"I have attended the majority of the lunchtime lectures, generally only missing them if I have been away. In the main, I have found them to be stimulating and interesting even when the title has not really sounded as if it would be something I was interested in. Where follow-up discussions have taken place, these have provoked some interesting ideas and perspectives."

Hosting

LUSSA volunteers hosted the lectures (introducing the lecturer, facilitating questions and thanking him/her). We used this slot to make any announcements about the programme and used a notice board to display information about forthcoming public lectures and seminars run by other departments.

Lecturers were given the following brief:

"Our speakers usually talk for between 25 and 40 minutes followed by questions/discussion. You might want to bring some questions for people to discuss in small groups at the end of the talk – then everyone will have the chance to talk

about the talk before we open it up to the whole group. After the talk we will be going to the [VENUE] to discuss the lecture further - if you're available to join us then you'd also be very welcome.

Because some of the participants are hard of hearing, please use the microphone which we will provide. We would like to record the lecture and put it on our Virtual Learning Environment* for people to listen to again, or access if they haven't been able to make it. Please let me know if you don't want us to do this.

I'm copying this email to [NAME], one of our Senior Learners, who will be chairing your session."

* Virtual Learning Environment - see page 26.

Awards

As a way to recognise the contribution of the lecturers, we made two awards for our lunchtime speakers each term. Learners voted for the lecturer they would most like to hear again and the lecturer who made their subject the most accessible to a group of older learners.

TIP

In future, we will ask learners who took part in the Open Lectures to recommend lecturers for the Lunchtime Lectures.

Issue

We had initial concerns about whether the room we had booked for the Monday Lunchtime Lectures would be big enough, however this concern proved to be unfounded as of course all those registered did not come to every lecture.

There is a lot of pressure on room availability at Lancaster University during term-time and we struggled to find a suitable room for the two consecutive hours. The room needed to be big enough, suitable for the lecture (with Powerpoint presentation facilities provided) and the discussion, and where learners could either eat a packed lunch or buy lunch nearby. Most (if not all) of the rooms on campus that provide Powerpoint facilities do not permit eating or drinking. Most (if not all) of the lecturers used Powerpoint. We found that if we moved learners from one room to another, people drifted away after the lecture and didn't stay for the discussion. The issue over finding a suitable room was an even bigger problem for the learning circle (see below).

8.3   Programme activities: Learning Circles

Our experience during the NLA

This element of the programme did not run as well as we had hoped. Take up was poor and the learning circle that did run was somewhat unfocussed; many of the learners who joined the learning circle did not find it very useful. We failed to clearly explain what benefits learners would gain from taking part, and we found it difficult to find a suitable time and venue due to restrictions over room availability.

The learning circle was meant to provide an opportunity for participants to talk about and reflect on the Open Lectures they had been attending and/or their own independent research into a topic that has particular interest to them, as well as other, independent learning they are engaged in. We aimed to encourage participants to support each other by asking questions and giving feedback, reading out or circulating some of their work and inviting constructive feedback from others in the group.

One learning circle participant and a LUSSA volunteer, commented:

"You get to know what others are working on and then when you see an article or TV programme you let them know"

Despite the drawbacks that we encountered, some participants remain very committed to the mutual support they've gained from meeting with their peers and sharing their learning and research journeys over the last two terms. They plan to carry this experience on as long as they can, perhaps concentrating a little more in the future on expanding on individual research projects.

Prior to this project, we had run a very successful research circle with senior learners. We came to use the terms **learning circle** and **research circle** interchangeably, which reflects the different purposes such a group can serve.

LUSSA's research into learning/research circles

As mentioned above, in our previous programme for senior learners a research circle was facilitated by the programme co-ordinator and it was one of the most popular parts of the programme. George Henson and others in the LUSSA core group have done a considerable amount of research on the benefits of the 'circle' way of learning, creating, researching and benefiting from being part of a learning community.

They recommend 'Learning for tomorrow: whole person learning for the planetary citizen' by Bryce Taylor (Oasis Publications, 2007). Table 7 in that book contrasts 'traditional learning' and 'whole person learning' – whole person learning encourages participant involvement in planning, the development of a questioning

attitude, the identification of your own learning objectives based on your own needs, an involvement in the process of learning how to learn, informality and spontaneity, the identification of relevant problems, self and peer evaluation and cooperation, and personal accountability for your learning rather than external validation. The Learning Circles aim to deliver all these positive outcomes.

You can find further information about George's research and ideas in Appendix E.

Organisation of future learning/research circles

What follows is a summary of how the learning/research circle will be organised in the future, as we firmly believe that this element of the programme provides a valuable space for learners to focus on their learning, to reflect, to gain peer feedback, and to find motivation to plan and continue their learning both as part of the NLA and in the context of their interests with the U3A and elsewhere.

Timing

Schedule the learning circle on the same day as the bulk of other activities (in our case the Lunchtime Lecture and discussion), after a short break. LUSSA volunteers suggest 2 - 2½ hours per session.

Location

Book either the same room as the Lunchtime Lecture and discussion or one that is very close by.

Promotion

Be very clear about the purpose and benefits of the learning circle when it is promoted to learners.

Facilitation

The group needs to be focussed and well-facilitated in order for all participants to get equal value from the session.

See Appendix F, for a draft of the research/learning circle format that is proposed for 2010/11 by members of LUSSA.

Size

So that each participant has time to talk about what they have been doing, we suggest a maximum size of 15 participants. Of course, you can run as many learning circles as necessary to cater for participants.

8.4 Programme activities: Access to public lectures and seminars

Most university departments run a range of public lectures and seminars. Some feature "big names" (there was one from the historian David Starkey during our programme, and another from Bobby Charlton just after it finished), others give academic staff and PhD students an opportunity to talk to peers about their work. Most universities also run a range of arts events such as concerts, theatre productions and art exhibitions.

Information about these public events is usually available on-line in a university events diary, however in our experience these are not necessarily comprehensive. Individual departments and sections also tend to have an events diary and we regularly checked these web pages to find suitable events to promote to NLA learners. Information about significant events is usually sent by email to Heads of Departments, and sometimes they are sent postal fliers. Some events are open access, for others you have to register in advance.

We provided information about such events on our notice-board at the Lunchtime Lectures. We recommend that one of the volunteers takes responsibility for this, and also for putting this information in a programme newsletter as well as on the programme's website and/or virtual learning site.

8.5   Programme activities: Library and IT access

Library
We had previously negotiated borrowing rights of three books at a time for our Senior Learners' Programme. This was continued for the NLA programme following this procedure:

- Programme staff give library contact a list of participants' names
- Participants go to library with programme confirmation letter, ID and photo
- Library issues library card

The cards were issued on a termly basis and it would have been much better to do this over the whole academic year.

We ran induction sessions for using the library at the start of each term.

IT
We registered learners for a University computing account using the existing system for registering external users.

This gave learners the following benefits, free of charge:
- University email account
- Use of the internet
- Access to the NLA programme virtual learning environment (VLE) and the VLE for any Open Lecture courses they took
- Use of University computing facilities including, for example, computers in computer rooms all over campus, printers, borrowing a laptop in the student "learning zone"

Learners could use University printing facilities on a paid-for basis by buying credit for their computer account in advance.

We ran induction sessions on using IT facilities and the VLE at the start of each term.

The Virtual Learning Environment (VLE)
Part of the modern university student experience includes use of new technology and increasingly departments use course VLEs to provide information about the course such as reading lists and lecturers' notes. We wanted to get our learners using the VLE so that they could participate fully in this part of the "adventure". It would also make communicating with learners easier if all were regularly accessing the programme's VLE to check for updates and programme news.

We set up a VLE discussion forum for the New Learning Adventure and showed learners how to access it during the Information Days. We also organised special introductory sessions on the VLE at the start of each term.

Of course we did not succeed! While more than half of the learners did use email to communicate with us (and vice versa), fewer used the VLE and we could not rely on this method to communicate with learners. Post continues to be the most reliable way to ensure that all learners receive information about the programme.

9. Disabled students

Universities are required by law to be accessible for disabled students. For example, as standard they provide wheelchair access and adapted toilet facilities, induction loops, and information in alternative formats.

While a few learners made us aware of their special needs and we were able to cater for these specifically, we also had to be aware throughout the project that the physical needs of our older learners were not necessarily the same as those of younger students.

For example, there were issues with the following:

Unsuitability of rooms – uncomfortable seating, lots of steps, poor lighting

Hearing – lecturers not speaking clearly or speaking with head turned away from audience, no microphone in large rooms, difficulty hearing during discussions

Sight – lectures using small print in their presentations and handouts, and/or using print against a coloured background

Transport– car parking areas and bus stops being some distance from lecture and seminar rooms

Moving around campus – Lancaster is a large campus. We needed to allow time for learners to move between venues on site, and where possible group activities in one area to avoid too much moving about.

10. Useful web sites

Brainpower - a resource on developments in the brain sciences and psychology with links to specialist websites (Centre for Lifelong Learning, Strathclyde University)
http://lifelongscotland.tripod.com/brainpower/

Continuing Learning Group, Centre for Ageing Research, School of Health and Medicine, Lancaster University
http://www.lancs.ac.uk/shm/research/C4AR/olderLearners.php

Department of Continuing Education, Lancaster University (to end July 2010)
http://www.lancaster.ac.uk/depts/conted/index.htm

Grants and funding (subscription website)
http://www.grantsonline.org.uk/

Grants and loans - information from the National Council for Voluntary Service
http://www.fundingcentral.org.uk/

How-to Guides
http://en.wikipedia.org/wiki/How_To

Lancaster and Morecambe U3A
http://www.lancasterandmorecambeu3a.org.uk/

Lancaster University Senior Students Association
http://sls.lusu.co.uk/

Learning Revolution – informal adult learning White Paper
http://www.dius.gov.uk/policies/further-education-skills/engaging-learners/informal-adult-learning/white-paper

New Learning Adventure
http://www.lancs.ac.uk/depts/conted/seniorlearners.htm

Senior Studies Institute, University of Strathclyde
http://www.strath.ac.uk/cll/seniorstudiesinstituteand3lsstudentsassociation/

Transformation Fund
http://www.transformationfund.org.uk/

U3A (national)
http://u3a.org.uk/

Universities UK
http://www.universitiesuk.ac.uk/

Appendices

Appendix A (separate file)
Information about the Senior Learners

Appendix B
Sample reply slip – expression of interest

Appendix C (separate file)
Sample enrolment form

Appendix D
Protocol for Open Lectures

Appendix E (separate file)
About Learning Circles

Appendix F
Format of Research/Learning Circle (draft)

APPENDIX B
Sample reply slip – expression of interest

Including introductory text from U3A newsletter, August 2009

This is what you should do next:

- Complete the reply slip below to **register your interest** and send it to us before the 7 September. No commitment at this stage!
- Come to one of our **Information Days,** 10.30am - 4.30pm on:
Monday 14 September - including an introduction to LUVLE
Monday 21 September - including an introduction to the Library
Talk to senior learners who have sat in on University lectures previously, find out which lectures are available this autumn and choose which one you want to go to. Don't worry if you miss one - there will be the opportunity to catch up later in the term. We will make other arrangements for you if you can't come to either day.

The final date to enrol for the programme is Wednesday 23 September.

Disabled students: please let us know your needs well in advance and we will do our best to ensure that you can take part on equal terms. Please put a note in with the reply slip. For information in alternative formats, please contact [NAME} on tel. [number]

- -

A NEW LEARNING ADVENTURE REPLY SLIP

Your full name

U3A membership number

Address

Home or mobile tel. number

Email address

Which Information Day do you wish to attend? (tick one or more boxes)
☐ 14 September   ☐ 21 September   ☐ Neither

Post this slip to us to arrive before the 7 September: Department of Continuing Education, Lancaster University, Ash House, Lancaster LA1 4YT

APPENDIX D
Open Lecture protocol

Extract from NLA Information Pack
A number of members of the Senior Learners' Programme took part in a pilot of this scheme last year. From this pilot we have put together some pointers on etiquette, which we hope will help to ensure that everyone has an enjoyable experience.

(i) Keep a low profile
As you will be aware undergraduate students now pay several thousand pounds over the course of their degree programme. They are therefore the lecturers' main concern. We ask that participants in the Open Lectures Scheme maintain a "low profile" while attending lectures, and avoid taking up the lecturer's time with anything that will not be of interest to other students. This means that you should only ask the lecturer a question if you are invited to do so.

(ii) Raise queries with the NLA team
Please raise any queries about the Open Lectures with [NAME] – or with any of the Core Group (see attached sheet). They will find out the information you need for you or will let you know who to speak to. Please do not raise your queries with the lecturer or the Department concerned.

(iii) Interactions with other students
We encourage you to chat with the undergraduate students before and after the lectures. They might be interested to hear about the Open Lecture scheme and probably won't have heard of it before. We will let you know who else is attending the lecture from the NLA programme so that you have someone to sit with!

(iv) What if the lecturer asks who I am?
We will try to ensure that all lecturers are aware in advance that older adults will be attending their lectures as part of the Open Lectures scheme, however we may not be able to do this comprehensively before the first lectures. If the lecturer asks who you are, you should say that you are part of the University's Open Lectures scheme and that their Head of Department and Departmental Secretary have been informed about this. They could call the Department of Continuing Education on 01524 592623 if they wish to speak to us about it.

(v) What if there is not enough space?
Undergraduate students can change their mind about which courses to take until about three weeks into the first term and very occasionally this means that courses become full after term has started. We stress that this is unusual, however if you arrive for a lecture and find there are not enough seats in the room for everyone, then unfortunately you will not be able to attend. For the above mentioned reasons undergraduate students will take priority. Let us know about the problem and we will see if it can be resolved.

APPENDIX F
Format of Research/Learning Circle (DRAFT)

Lancaster University Continuing Learning Group

	DURATION	ACTIVITY	
	5 mins	**Weekend Chat** A chance to catch to explain what you have been doing socially.	
	30 mins	**Research Updates** How has your learning gone since the last meeting?	
	20 mins	**Rabbits** A chance to contribute to other student's ideas.	
	20 mins	**Break** Tea/Coffee etc.	
	30 mins	**Presentation** A short presentation on an interesting subject.	
	30 mins	**Research Project Group Work** Discussion groups, projects and peer study support.	
	15 mins	**Report Back/Pledges/Choose Facilitator + Timer** How have you got on? What will you do next? Who will run the next RC?	

Notes on Research Circle Format.

A facilitator and a time keeper would have been appointed at the end of the previous Research Circle. They should make themselves known to the group at the beginning of the present session. It may be beneficial to outline the format of the session before beginning and it is important that the format is adhered to as closely as possible in order to allow each student to participate fully and for each section of the circle to fulfil its role.

5 mins	**Weekend Chat** In pairs. A brief discussion of what you have been doing over the last week/weekend. This is likely to be non-study related and is a chance for people to get to know each other as people not just as fellow students.
30 mins	**Research Updates** This is a chance for each student to explain to the group as a whole what kind of learning they have been involved with this week, what has been the focus of their studies and what they have encountered in the process. The 30 mins will be divided amongst the whole group (15=2 mins each, 10=3 mins etc.). Each student will be able to speak uninterrupted. Other students may have things that they would like to add. This is done in the next part of the session.
20 mins	**Rabbits*** This is the part of the research circle where those with points to make in relation to the previous section get to do so. Often students have advice, information, helpful suggestions etc. relating to other students research/studies. These may be put forward to the relevant student/s now they have had the chance to explain their research without interruption. It has been found to be highly beneficial to separate these two sections of the research circle as it facilitates personal expression for both parties. *Rabbits is so-called because it was part of an explanation now almost lost in the mists of time about how people often don't listen to others, but talk about THEIR issues, eg 'yes, that's interesting about your rabbit, I'VE got a rabbit!' or similar.
20 mins	**Break** A chance to have tea/biscuits/chit-chat/leg stretch

30 mins	**Presentation**

In this section of the research circle one or more students, or an invited guest, will be able to present something of interest to the whole group. This may be a presentation of research findings, a short tutorial on an aspect of study which the student thinks will benefit the group, or anything that is deemed appropriate and of interest. Presenting students will be encouraged to share their passion for their subject in the form of either a talk, PowerPoint presentation, or even a focus group. These presentations will be scheduled in advance so that they may be planned and prepared. This gives each student a chance to work with the knowledge they have gained through their studies whilst also providing interest and stimulation to the other students. This will be optional and no student is expected to present their ideas/thoughts if they do not wish to.

We would also like to invite professionals that we know from outside the university to come along and share their knowledge.

This section should ideally consist of a 20 min presentation followed by 10 mins of questions and answers.

30 mins	**Research Project Group Work**

In this part of the Research Circle students will split into groups for the purpose of furthering their projects. There will be a number of project groups concentrating on different work. At this point the groups that have been suggested are:

Umbrella Group
This group will consist of students who are involved in a project which is designed to benefit the Centre for Ageing Research (C4AR) in some way. This may be designing research questionnaires, discussing positive ageing experiences, partaking in consultation work or any number of things which constitute a project with the main aim being to provide the Centre with information and assistance. The duration of each project will be agreed beforehand (e.g. 4 weeks, 6 weeks, 10 weeks)

Open Lecture Discussion Group/s
This group/s will consist of students who are attending open lectures and would like to discuss the content further. Students would be encouraged to work with other students who attend the same lectures. It would be advantageous to

promote this option in the open lecture literature and try to encourage your peers to extend their studies into a discussion group at the Research Circle. This would be the tutorial which many students feel is missing from their attendance at open lectures.

Lunchtime Lecture Discussion Group
This group will consist of those students who attended the lunchtime lecture earlier in the day and who would like to spend more time discussing the subject matter and the questions which the lecture may have raised for them. It is a chance for students to work with the ideas and information gained in the lecture. The lecturer will not be present for this discussion group.

Personal Study Support Group
This group will contain those students who are undertaking personal research study. It will aim to be a sounding board for each student in the form of questions and answers, suggestions and assistance where possible. It has been found in the past that the study of different subjects is not necessarily a barrier to a group such as this and that a supportive atmosphere and a chance to discuss one's research can really work and has the ability to keep a solitary student from settling into a rut.

15 mins   **Report Back/Pledges/Choose Facilitator + Time Keeper**
This is a chance for the group to reconvene. Spokespersons from the various groups are encouraged to outline what has been achieved in the previous session. Students may then want to make a pledge as to what they intend to do regarding their studies for next week. This is optional but we have found that some students like to make a pledge as it motivates them.

Finally a facilitator and a time keeper is picked by mutual consent for the next research circle.

Revised Research Circle format incorporating Fiona Frank's original format plus aspects of the Swedish Study Circle model.

**Devised and formulated by Janet Ross-Mills and David Pedder
with contributions from the Continuing Learning Steering Group (May 2010)**