



CASTLEMAINE
UNIVERSITY OF THE THIRD AGE

“U3A Castlemaine: the difference between isolation and community involvement.”

The Membership Profile of U3A Castlemaine

January 2015

Summary

A survey of over half the membership of U3A Castlemaine in January 2015 shows:

- U3A has an important role in Mount Alexander Shire in reducing isolation for older residents, providing educational and physical activities and the opportunity for social interaction.
- A third of the members are men.
- Half the members live alone, but the figure rises to 60 per cent for those over 65 – while nearly three quarters of the men over 65 live alone. Members value U3A as a way to reduce isolation.
- More than half the members are educated to degree level or above, but 6 per cent did not finish high school.
- Nearly two thirds of the members have an income of less than \$30,000 a year (\$45,000 for a couple).
- A third of members are affected by some form of disability; one in eight walks with difficulty and one in eight is hard of hearing. Two thirds (68 per cent) of male members live alone, and of these 33 per cent have a disability. Overall one in five (22 per cent of male members, and 18 per cent of female members) lives alone and also has a disability.
- Members are well connected with other community organisations, on average participating in more than two other groups, and maintaining a strong culture of volunteering.

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Active Ageing in Mount Alexander Shire

One in five of the nearly 18,000 residents of Mount Alexander Shire is over 65 (MASC, 2013, p.2). That is significantly more than the proportion of over 65s in Victoria as a whole. The shire is also increasing its population year on year, and each age group over 45 had a larger percentage than the state average in the 2011 census. With a median age of 47 in Mount Alexander (as many people were over 47 as under 47) the age group eligible for U3A membership is likely to grow rapidly.

The Mount Alexander Shire Aged and Disability Strategic Plan, Prepared by Effective Change for Mount Alexander Shire Aged and Disability Services and adopted by Council in 2007, has a strategic priority:

“Reduce isolation and improve wellbeing through better service coordination and the promotion of programs that encourage ‘Active Ageing’.” (MASC, 2007, p.3).

Over half the residents of Mount Alexander Shire live in Castlemaine itself. It is a town known to be home to many artists, musicians and writers, and to have developed a large number of environmental groups and campaigns. As a centre of gold exploration from the middle of the nineteenth century, it has a central townscape of significant buildings which includes an impressive town hall, a prominent post office, the oldest surviving telegraph station building in Victoria, a Market Building, the oldest continually operating theatre in mainland Australia dating from 1852, and a 1930s Art Gallery building hosting a unique collection of Australian art.

Membership of U3A Castlemaine has been stable for the last few years at around 450, with over 80 courses and activities run by members on a voluntary basis. Some run throughout the year from February to December, but others are short courses with fewer sessions. The U3A has a committee structure with a number of working groups, which involve many of the membership. The major office holders retire after three years at most, so there are always fresh ideas.

‘A Home of Our Own’

Classes and activities take place in a range of venues, including a small and uncomfortable room rented throughout the year from the Uniting Church, and a number of larger rooms in the church complex and elsewhere, as well as in members’ homes. The Accommodation Working Group was actively campaigning for permanent and suitable premises, particularly ‘a home of our own’ as other U3As in Victoria have. It was agreed that it would be useful to raise the profile of U3A Castlemaine’s significant role in ‘active ageing’, and at the same dispel any ideas that U3A members are an exclusive group of middle-class, highly educated self-funded retirees.

With the help of a member with some survey experience, a short survey instrument was devised (Appendix 1). Alternative methods of distributing the survey (at a monthly coffee morning, or with an email link to an online survey) were rejected as likely to reach only a section of the membership, so it was decided to approach members when they came to re-register and enroll for classes on the two enrolment mornings at the start of 2015. Each member was asked to sit and complete the survey

anonymously as soon as they had handed in their course choice form. Only one member refused, giving 226 respondents, about half the total membership. There may be many reasons why members do not enroll in person (family commitments, holidays, illness, etc.) but there is no reason to expect any consistent differences which would greatly distort the findings. Responses were entered into a database and analysed using Excel, while all the written comments were typed up and used to inform and illustrate the report. There is a fuller discussion of the methodology in Appendix 2.

More than Education – Social Interaction

U3A Castlemaine offers over 80 courses throughout the year, and members typically enroll in any number between one and ten. Unsurprisingly, the courses were praised by members responding to the survey. One said “It’s brilliant. I love learning French at U3A” but went on to add “Tutors are great and I have made lots of friends” (65-74, woman, graduate, higher income group). For many respondents it is the mix of educational and social stimulation which is most valued.

There were as many comments reflecting the value of social interaction, the importance of mixing with stimulating people, as comments on what members derive from the content of classes. One member said:

“I am a full time carer of my daughter with disabilities so U3A provides me with a valuable outlet for socialisation and enjoyment.” (woman aged 65-74)

Both the education and the social contact were valued by respondents who previously had very different levels of education: “The friendship, social and educational environments” were mentioned by one woman, aged between 65 and 74, who did not complete high school, and now lives with a partner on a low income. It “stimulates my brain, challenges my thinking, offers new experiences, provides social contacts” said a man, also in the 65-74 age group, with hearing loss, a tertiary education, and living on a low income.

Some members referred to the physical wellbeing fostered by U3A activities:

“I have met great people and am keeping active physically and mentally. Love it!” (woman, graduate, aged 65-74, living alone, low income)

“My participation in Tai Chi has improved (maintained) my ability to move more freely and keeps me flexible.” (man aged 75-84, with hearing loss, living with a partner on a low income)

There is some concern that the word ‘university’ in the organisation’s title might discourage people without previous formal qualifications, but Figure 1 shows that 6 per cent of members ended their formal education without completing high school, and another 12 per cent completed high school and took no further qualifications. One in five reported that they had not had any higher education (diplomas or degrees). Table 1 shows the different levels of education achieved by age group.

Several of those with degrees took pride in ticking the ‘did not complete high school’ box to indicate that they studied as mature students. One issue not explored in the survey was the age at which members obtained their higher degrees. Anecdotal evidence suggests that a number of members, particularly women, took advantage of fee-free tertiary education, which was available from its introduction by the government led by Gough Whitlam in 1974 to 1988. In each case their highest qualification was used in the classification.

Figure 1: Highest Level of Education Completed

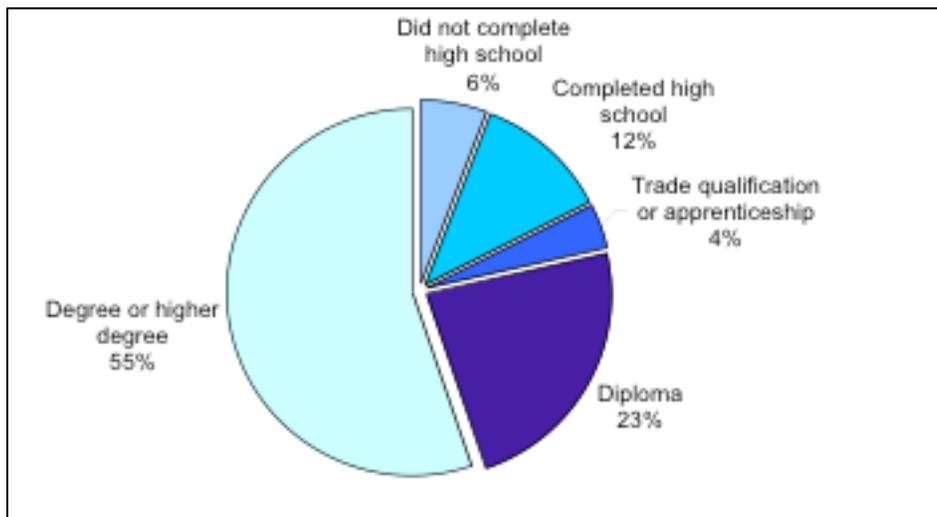
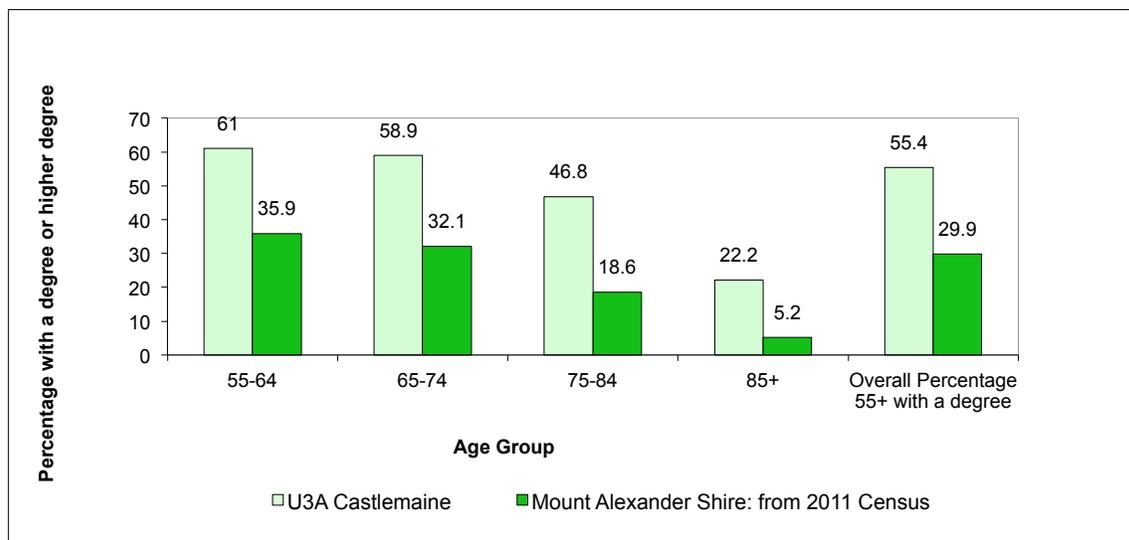


Table 1: Highest level of education completed by age group

	<55	55-64	65-74	75-84	85+	Total
Did not complete high school	0	1	7	4	1	13
	0.0%	2.4%	5.6%	8.5%	11.1%	5.8%
Completed high school	0	5	11	5	5	26
	0.0%	12.2%	8.9%	10.6%	55.6%	11.6%
Trade qualification or apprenticeship	0	2	3	4	0	9
	0.0%	4.9%	2.4%	8.5%	0.0%	4.0%
Diploma	1	8	30	12	1	52
	33.3%	19.5%	24.2%	25.5%	11.1%	23.2%
Degree or higher degree	2	25	73	22	2	124
	66.7%	61.0%	58.9%	46.8%	22.2%	55.4%
	3	41	124	47	9	N=224

The proportion of graduates is higher than in the Shire as a whole – which has 27 per cent overall (MASC, 2013, p.3). A remarkable one in 20 of the Shire’s over-85s has a degree. The U3A members have a figure of one in five, though based on a very small number. Figure 2 compares the number with degree qualifications and above by age group and gender, and shows that U3A Castlemaine members are nearly twice as likely to have degrees as other seniors in the area.

Figure 2: Degree or higher degree qualification by age group – comparing U3A members with all seniors in Mount Alexander Shire



Countering Isolation

This survey shows the way U3A contributes to members’ physical and mental wellbeing and reduces isolation. Over 40 per cent of U3A members live alone, but for members over 65, the proportion living alone increases significantly. Table 2 shows that well over half of those in the older age group live alone, and nearly three quarters of the men are on their own at home. These figures are significantly different from the most recent census figures for Mount Alexander Shire, which show 23 per cent of older men and 39 per cent of older women living alone (Australian Bureau Of Statistics, 2011, Table B23). This difference indicates that U3A is providing something valued by older men living independently – a group which is targeted by government for its vulnerability to depression and other health issues.

The member who said “Singing gives me enjoyment. Latin improves my mind” may not be typical, but it illustrates what U3A can offer (man 65-74, lives alone, degree, low income). Another wrote “Learning new things. Structure to the week. New friends.” (man, 65-74, living alone, low income).

“Living alone is unnatural! U3A provides a focus, a life line to the community” declared one older member, a degree-educated woman over 85 with multiple disabilities including hearing and vision loss. Another woman living alone said: “Being fairly new to Castlemaine it has been an invaluable way of becoming involved and getting to know people (of my own age) in the community.” (woman, aged between 55 and 64, degree educated, has difficulty walking, lives alone, low income).

In Mount Alexander Shire women aged over 55 outnumber men over 55 in a ratio of 53:47. In the U3A the ratio is 71:29, but there are significant numbers of men, and their appreciation of the organisation was clear from their comments on the survey. Typical comments from men referred to making

“enduring friendships” and “enjoy stimulation of classes” (75-84, man, graduate, low income), and “Social interaction with people outside my normal friendship group” (55-64, man, graduate, higher income).

Table 2: Living Alone: Members Aged 65+

		Number	Percentage
Women over 65	Living alone	60	50.4%
	Not alone	59	49.6%
	<i>Not stated</i>	2	
		121	
Men over 65	Living alone	40	72.7%
	Not alone	15	27.3%
	<i>Not stated</i>	0	
		55	
All members over 65	Living alone	100	57.5%
	Not alone	76	43.7%
	<i>Not stated</i>	2	

N=178

Mobility and Disability

While all but 6 per cent had access to a car and could drive, a third of the members reported that their access to activities is restricted by ill-health or disability. A small but growing number of members have mobility scooters, which were not specifically asked about. One woman spoke for many of the less physically able members when she said that with “limited mobility and memory failing, I need stimulation and company” (woman over 85, loss of hearing, difficulty walking, no car, doesn’t live alone, completed high school).

Table 4: Members with Disabilities

None	140	67.6%
Vision impairment	9	4.3%
Loss of hearing	25	12.1%
An illness or condition limiting activities outside the home	14	6.8%
A temporary illness, accident or condition	7	3.4%
Difficulty in walking	25	12.1%
More than one disability (also included in the separate categories above)	10	4.8%
	N=207	

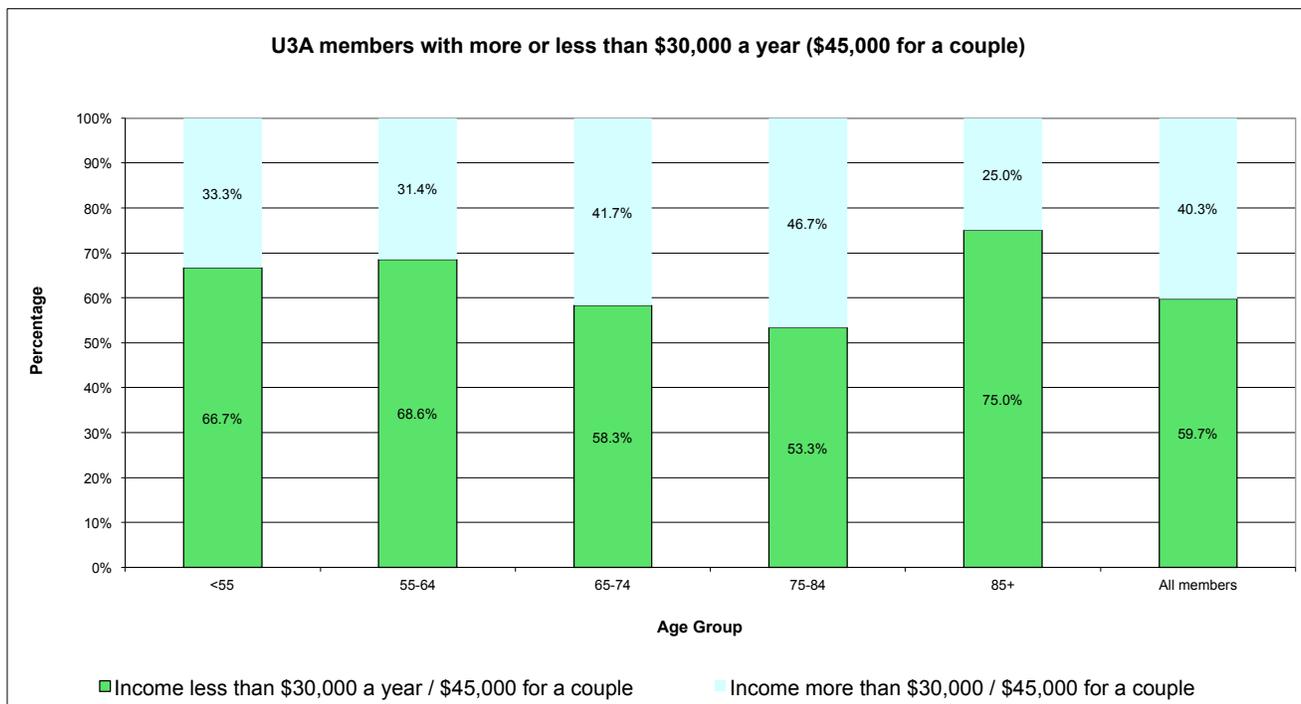
One in five members lives alone with a disability (22 per cent of male members and 18 per cent of women). Of the two thirds (68 per cent) of men who live alone, a third have a disability. These figures mean that U3A members do not conform to the general expectation that it is women living alone who are more likely to have a disability.

Income

According to the Australian Council of Social Services over a third of people over 64 have an income below 60% of the Australian median income (ACOSS, 2014, p.21). Living on the age pension alone would put a person or a couple significantly below 50% of median income, which is currently over \$60,000, while pension rates are about \$23,000 for a single person, and \$34,000 for a couple. The Castlemaine survey asked U3A members if their annual income was above or below \$30,000 for a single person or \$45,000 for a couple, to see how many were living below the “50% poverty line”, that is, have an income less than half the median income in Australia (ACOSS, 2014, p.19). While this is clearly an arbitrary amount, it is clearly a level of income which leaves little room for luxuries.

In any repeat of the survey, it might be useful to ask about home ownership, although of course that is a complicating factor: home ownership may reduce some outlays and increase others. Some members are ‘asset rich’, but have trouble maintaining their properties.

Figure 3: Living on a Low Income



The overwhelming majority of members answered the income question, with fewer than one in ten opting to leave it blank (Table 3). The survey found 60 per cent of U3A members living below this

line. Many respondents who said their annual income was below \$30,000 for a single person (\$45,000 for a couple) have only their pensions to live on. Table 4 shows that women in all the age groups were more likely to be living on an income below the \$30,000 (\$45,000) line – and only the men 64 and under, that is, those below retirement age, were more likely to be over that income level than below it.

Table 3: Living on a Low Income by Age Group

Age group	<55	55-64	65-74	75-84	85+	Total
Less than \$30,000 a year (single) or \$45,000 a year (couple)	2	24	67	24	6	123
	66.7%	68.6%	58.3%	53.3%	75.0%	59.7%
More than \$30,000 a year (single) or \$45,000 a year (couple)	1	11	48	21	2	83
	33.3%	31.4%	41.7%	46.7%	25.0%	40.3%
	3	35	115	45	8	N=206

Table 4: Living on a Low Income By Age Group and Gender

Age Group		55-64	65-74	75+
Women	Less than \$30,000 a year (single) or \$45,000 a year (couple)	16	45	23
		53.3%	50.6%	69.7%
Women	More than \$30,000 a year (single) or \$45,000 a year (couple)	14	44	10
		46.7%	49.4%	30.3%
Men	Less than \$30,000 a year (single) or \$45,000 a year (couple)	4	20	12
		44.4%	60.6%	75.0%
Men	More than \$30,000 a year (single) or \$45,000 a year (couple)	5	13	4
		55.6%	39.4%	25.0%

N=210

U3A Castlemaine provides unlimited access to its courses for an annual membership of \$50 (less than £30 at 2015 exchange rates). One member who praised the U3A as giving a “sense of purpose, fulfilment, enrichment and hard work” added “Most importantly AFFORDABLE” (woman between 65 and 74, difficulty walking, limited access to a car, has a degree, low income). A man living on a low income, who did not complete high school and now has hearing loss, told us “It is a wonderful way to spend my retirement years, learning and participating in so many interesting pursuits”.

Community

The Mount Alexander Shire Community Profile shows that half the Shire’s residents do some volunteering – the state average is a third – and this survey shows that, although U3A members are older, they maintain a strong volunteer presence locally. U3A members overwhelmingly contribute volunteer time to the community. Members participate as members or volunteers in an average of 2.3 other organisations, ranging from the CFA (the voluntary fire service in rural areas) to Buda (a historic house in Castlemaine), from car clubs to the State Festival, from the Embroiderers’ Guild to Landcare.

In addition, almost a third of U3A members have designated voluntary roles within U3A itself – not only the 60 or more course leaders, but on committees, working groups, and staffing the office. One member described the value of U3A as the “ability to enrich the lives of others” (man aged between 65 and 74).

In addition, an astonishing 15 per cent of U3A members find time to serve on the committees of other local clubs and organisations.

Members’ comments summed up that U3A means more to them than just what it does for them:

‘Social – building a strong community. Time out. Learning new skills. Meeting new people.’
(woman, under 55, living alone with no car on a low income).

“It enables me to contribute to the social life of Castlemaine by doing something I enjoy.” (male, 65-74, degree, low income).

References

Australian Bureau Of Statistics (2013) *Census of Population and Housing: 2011 Census Community Profiles, Mount Alexander* [online at http://www.censusdata.abs.gov.au/census_services/getproduct/census/2011/communityprofile/LGA25430?opendocument&navpos=220, accessed January 2015]

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MASC, Mount Alexander Shire Council (2013) *The Mount Alexander Shire Community Profile* [online at http://www.mountalexander.vic.gov.au/files/Mount_Alexander_Shire_Community_Profile_February_2013.docx.pdf, accessed January 2015]

Appendix 1



We are asking all our members to tell us more about their situation, because we want to show Mount Alexander Shire Council, and the rest of the community, what a significant role U3A has in Castlemaine. The survey is anonymous, so we hope you will answer personal questions.

1. Which age group are you in?

- Less than 55
- 55-64
- 65-74
- 75-84
- 85 and over

2. Do you identify as

- Male
- Female

3. Do you have any disabilities or medical conditions which limit your activities?

- I am not affected by a disability or medical condition
- Loss of vision
- Loss of hearing
- An illness or condition which limits your activities outside your home
- A temporary illness, accident or condition which has limited your activities in the last year
- Difficulty in walking

Other (please write in)

4. Are you able to drive to U3A activities?

- Yes
- No, I do not have a car or I am not able to drive

5. What ethnicity or ethnicities do you identify with?

- Australian
- Aboriginal or Torres Strait Islander
- British/Irish
- Other European

Other (please write in)

6. U3A classes and social activities may be particularly important for people who live alone. Do you live alone?

- Yes
- No

Please add a comment if you wish

7. What is the highest level of education you have completed?

- Did not complete high school
- Completed high school
- Trade qualification or apprenticeship
- Diploma
- Degree or higher degree

Other (please write in)

PTO

8. It would help the U3A committee to know what proportion of our members are on a low income. Remember, this survey is completely anonymous. It's hard to define a low income, but please tell us if your income is below \$30,000 a year for a single person or below \$45,000 for a couple.

- Below \$30,000 for a single person, below \$45,000 for a couple
 Above \$30,000 for a single person, above \$45,000 for a couple

Please add a comment if you wish

9. Please tell us about other local community organisations in which you are active or are a volunteer. Please write in any other local organisations in which you participate.



	Volunteer	Member	Committee member
Buda			
Car club			
Castlemaine Art Gallery			
Castlemaine Historical Society			
Castlemaine Hospital – volunteer			
Castlemaine State Festival			
Church			
Community House and Growing Abundance			
CWA			
FOCAL: Friends of Castlemaine Library			
Gardening club (not a U3A group)			
Goldfields Railway			
Local environment group, e.g. Landcare, MASG, FOBIF, Field Nats			
RSL			
RSPCA			
Scouts, Guides			
Senior Citizens			
Service organisation, e.g. VIEW Club, Probus, Lions, Rotary			
SES, CFA			
Sports club(s) in which you participate, coach, etc.			
Sports club(s) in which you play			
Wordmine			

10. Thank you very much for your answers so far. Finally, please tell us what U3A means for you, or ways in which it enriches your life.

Please complete this questionnaire today and return it to the box provided.
 Castlemaine U3A, 2 Duke Street, Castlemaine, or P.O. Box 792, Castlemaine 3450

Appendix 2: Methodology

Questions

U3A Castlemaine designed a simple, ten-question survey instrument that fitted on two sides of a single A4 sheet. Although there were only ten questions, there was room for additional comments on most questions. They were typed up separately and used to enliven the report (as well as accounts for the local press, etc.). The survey was designed to provide demographic and financial data on the U3A membership.

The only question which was not used in the report concerned ethnicity. Seniors in Mount Alexander Shire are predominantly white European in origin, although that is set to change as some of the more recent refugee and 457 (working visa) arrivals grow older. The U3A members are generally, also, white, though some are from families which have been in Australia for generations. To demonstrate diversity in the U3A Castlemaine membership, it would have been possible to ask about sexuality, as there are significant numbers of gay and lesbian members in the U3A.

Question 9 found the enormous range of other associations and voluntary responsibilities of the members. Although there were considerable numbers of organisations written in that were not included in the original list, but having a list prompted respondents to think about the kind of organisations to which they do belong; a completely open question risked providing fewer responses because of memory problems.

Sample

It is fundamental to survey design that all members should have an equal chance of being included (although those who do not agree to participate might differ from those who do). This ruled out methods suggested by other U3As:

- online surveys – as not every member has easy access to the internet or is prepared to complete a survey using e.g. SurveyMonkey.
- going to a couple of large classes and getting the members there to take part – as that gives no chance to members only attending smaller or infrequent classes.
- giving the questionnaire out at all classes – because it would be hard to guard against members completing it more than once.
- handing out the survey form at coffee mornings – because although they are open to all members, they attract less than a quarter of the members, and those attending may well differ greatly from those who do not.
- postal methods – as U3A Castlemaine members, apart from those who have no access to email, do not generally receive mail from the organisation.

U3A Castlemaine has two enrolment days, which all members are expected to attend – and over half do. Every member was handed a survey form by a well-known and respected committee member after they had paid their subscription and chosen their courses. There were tables available with bundles of pens, and most members sat down and filled in the form before getting a cup of tea or

coffee or going home. With a single exception, every member who came to enrolment completed the survey.

Anonymity was guaranteed, and members put their completed forms in a box with a slot like a ballot box. No one was allowed to take the form away, and there was only one outright refusal. Though 19 did not answer the income question, that is around 8 per cent. This relatively high response was probably attributable to the very simple format of the question, which required little in the way of calculation. That is not to say that no member raised the issue of pre-tax income, or other complications – but the simple question gives an overall picture of the extent of ‘living on a low income’.

Members unable to attend the enrolment days might include some who were unwell at the time, or are frail, and this might have led the survey to underestimate the extent of disability and health problems, but the extent to which the representativeness of the survey was compromised by distribution at enrolment is unlikely to be large, as others would have missed the days through family obligations and others through forgetfulness. There is no discernible pattern in the course choices of members enrolling on the special days or at the office in the weeks after, which may indicate that those at enrolment are not likely to be significantly different from the membership as a whole.

Publicity and Response Rate

Convincing members of the purpose of the survey (in the Castlemaine case, to argue for better accommodation as well as to dispel myths about the wealth and previous education of U3A members) was important for a high response rate – and (nearly) every member agreed to participate. U3A Castlemaine:

- explained the purpose of the survey with an article in the monthly newsletter;
- talked about the survey and took questions at two of the monthly coffee mornings;
- included the importance of the survey in the email about enrolment days; and
- had a committee member hand each member the form, with a brief explanation of its value.

Analysis

A simple survey with this number of questions can be analysed relatively simply – indeed, the tables in the Castlemaine report were all produced using an Excel spreadsheet rather than specialist survey analysis software. It takes some experience to convert the questionnaire into ‘codeable’ data for entry into Excel (or a specialist software package) – a job SurveyMonkey and other online surveys effectively do for you – but two members working together were able to input the data and produce some useable tables and figures in a relatively short time.

In the tables $n=[\text{number of valid responses}]$ for each table when there are gaps in the data.

Reporting

With a good response rate, and most questions answered, U3A Castlemaine has been able to use the survey in publicity, showing the numbers of members in categories which the Shire might want to support (frail, living alone, etc.), and that members are well connected with, and make significant contributions to other local organisations. The reports have gone to the local State and Federal members as well as the mayor, councillors and officials of the Shire. COTA (Council on the Ageing, the voice of Victorian seniors), the Minister for Housing, Disability and Ageing, and the state U3A Network have all been engaged in discussion around the findings of this survey.

Finally, drawing attention to the role of U3A Castlemaine in promoting 'active ageing' might suggest ways of targeting publicity directed towards the recruitment of new members in the underrepresented groups.

Bridget Leach, July 2015