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Comparison between the French Model and the British Model



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International Association of Universities of Third Age

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I. The French Model: Universities of Third Age Directly Managed by Universities





The French model is based on the creation of Universities of the Third Age within universities, mainly public universities, as a department or faculty. This model also includes of Universities of the Third Age directly affiliated to universities, mainly public universities. These Universities of the Third Age are members of National Associations of Universities of the Third Age such the French Association (UFUTA) and the Slovak Association (ASUTV).

1. Universities of the Third Age Directly Managed by Universities

Four examples of Universities of the Third Age directly managed by universities are analyzed in this section. These are:



- the first University of the Third Age at Toulouse University (France)
- University of the Third Age at Comenius University in Bratislava (Slovakia)
- Sherbrook University of the Third Age (Canada)
- Santiago University of the Third Age

Toulouse University of Third Age (France)

Toulouse University of the Third Age was founded in 1973 by Professor Pierre Vellas who was Professor of International Law at the Toulouse University of Social Sciences. It originally offered a course on gerontology within Toulouse University Faculty of Social Sciences. The lectures were exclusively for pensioners. They focused on the expansion of memory and activities and actions to improve health and diet. Building on the success of this course, Professor Pierre Vellas opened new courses such as gymnastics and languages.



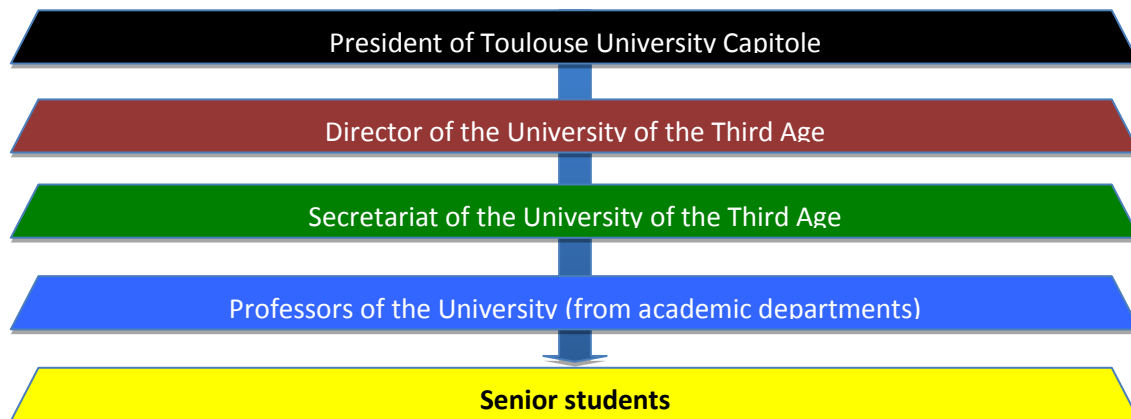
Toulouse University of the Third Age is a branch of Toulouse University I (Social Sciences) and part of the Continuing Education Department.

The President of the University directly appoints the Director of the University of the Third Age who can recruit staff and the office is provided in the building of the University.



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The University of Third Age **benefits from all the resources of the parent University including:**

- requesting professors from different disciplines to teach and give lectures at the University of the Third Age
- using classrooms and amphitheatres
- using equipment to teach foreign languages and using the University's IT facilities

Direct management by a public university offers several **advantages** but it also brings some **weaknesses**

Advantages	Weaknesses
<ul style="list-style-type: none"> ❖ <i>Lecture and workshop rooms, facilities and materials:</i> provided by the parent University which lowers the overall costs and thus fees, which benefit the students ❖ <i>Recruiting teachers:</i> links with the university make it easier to find and convince teachers to work with the U3As. Remuneration is facilitated by the university's HR Department ❖ Using the <i>university's website</i> ❖ <i>Benefiting from a strong reputation:</i> the U3A can benefit from the academic reputation of the parent university 	<ul style="list-style-type: none"> ❖ <i>Dependency:</i> the rules, names, staff, directors are dependent on the university's decisions ❖ <i>Overcapacity and lack of flexibility:</i> lecture halls provided by Toulouse University do not always have enough space for a full class. For this reason Toulouse U3A cannot accommodate too many senior students. Increasing the number of students would require drastic changes ❖ as the University have to cater for growing numbers of regular students, <i>university management are increasingly reluctant to provide rooms or lecture halls for senior students</i>, which they do not consider to be as important as regular students ❖ <i>Current economic situation:</i> resulting in tighter budgets and universities reducing their investment in building new lecture theatres and classrooms. This threatens the development of U3As within their walls. Independent Associations do not face these problems



University of the Third Age at Comenius University in Bratislava (Slovakia)

The University of the Third Age at Comenius University in Bratislava was from the outset part of the Department for Continuing Education. In 2005, when the U3A office was moved to the newly built Centre for Continuing Education of Comenius University, which is independently financed and managed. As a result, the Centre became responsible for all expenditure borne by the U3A director.



The Rector of Comenius University is the President of the U3A. He is responsible for signing project applications for call for proposals EU programs. The Centre for Continuing Education Director assumes the full responsibility for the work of the U3A on behalf of the Rector. The Rector's Committee for the U3A is the main body for the arrangement of the learning process. It is organized by the head of the U3A in cooperation with the Vice Rector for the education and the Director of the Centre.

The Committee consists of the Vice Rector, the Vice Deans of the faculties, the Director of the Centre, the Head of U3A, and the Lecturers. It prepares study programs and discusses other events (matriculation, graduation ceremonies) and the U3A's educational activities. One of the U3A's responsibilities with regards to Comenius University is the matriculation of new U3A students and the organization of graduation ceremonies.

The U3A has must submit a yearly statistical report to the Ministry of Education via the Rector's office detailing the following information: the number of older students and the number of graduates as well as their age, gender, the list of subjects they studied and other categories of information. Conferences and important meetings devoted to senior education are usually under the auspices of the Rector.

The Rector's Office appoints the Head of the U3A. He/she is responsible for the U3A's tasks and coordinates and manages all activities, arranges the lecture halls and classrooms and engages the lecturers from Comenius University's faculties. He/she coordinates the U3A Study Department and is responsible for the U3A's budget, fixing the student fees, coordinating projects and marketing activities for the U3A, establishing and maintaining international contacts and the external representation of the U3A.

Sherbrook University of the Third Age (Quebec – Canada)

Sherbrook University of the Third Age operates a similar system to that of Orleans University. It has created several subsidiaries or sub-branches in other towns. It is the oldest and largest University of the Third Age in Canada, founded in 1976 and today there are 28 sub-branches in 10 different regions of Quebec Province (the French speaking area of Canada).

Sherbrook University of the Third Age adopted concepts from both the French and the British models.



Sherbrook U3A is a part of the Sherbrook Public University. However, it relies on Associations for its sub-branches, and on volunteering from senior students. The U3A is entirely self-financed and does not receive any subsidies, although it does use public facilities.

In 2010, from a total body of 6,202 registered senior students 618, approximately 10%, were volunteers. The volunteers' work in the operation of the institution and the implementation of the activities is extremely important for the U3A.

Sherbrook U3A and its sub-branches rely on several partners for their facilities. Municipalities provide Community Centers but they can also rely on the members themselves to accommodate in-house courses.

Santiago University of the Third Age (Chile)

Santiago University of the Third Age in Chile is part of the **Adult Education Program** of Chile's Pontifical Catholic University. The program was first created in 1988 as a pilot program and was maintained by a decree of the Rectory in 1989. The University's Rector heads the U3A. However, the Vice Rectory of Communications manages the U3As daily tasks as well as continuing education at Santiago Catholic University.

In 2015, more than a thousand people participated in multiple activities, such as lectures, seminars and exhibitions on the themes of ageing.

Lecturers who teach at Santiago U3A are contracted by Santiago Catholic University. The U3A is entirely dependent on the University and its program can be divided into 4 categories:

- courses and activities exclusively for the elderly
- courses for professionals working with older people, opened to all ages
- research and dissemination of knowledge such as lectures, seminars, and exhibitions for people of all ages interested in the themes of ageing
- social projects initiatives that develop specific areas in relation to old age, for example, lectures for family carers, pilot projects on specific issues, and early retirement support programs





The program is self-funded through various activities including courses for seniors and graduates, courses for professionals working with older people, and strategic alliances with companies and the Government. The program is also funded by the University which pays staff, finances research and provides free activities for seniors.

One major difference between Toulouse U3A and Santiago U3A is that Toulouse is a department of the University run by a director - Professor François Vellas - and a secretary who are fully dedicated to the U3A. Professor Vellas is also director of the Master Degree 'Management and Economics of International Tourism'. Santiago U3A is not specifically referred to as a U3A but as a 'Program for seniors' ('Programa Adulto Mayor'). This program is managed by the Vice Rectory within a larger set of programs focusing on adult education.

2. U3As affiliated to Universities

Two examples of Universities of the Third Age affiliated to universities are analyzed in this section:

- The Rodez University of the Third Age affiliated to Toulouse University (France)
- The Universities of Free Time affiliated to Orleans University (France)

a. Rodez University of the Third Age Affiliated to Toulouse University (France)

Rodez (or Rouergue) University of the Third Age known as a University of Free-Time (or leisure) is a non-profit association incorporated in 2006 by Monique Viala, Professor in Private Law at the Rodez University Institute of Technology (IUT). Professor François Yence has headed the Association since 2012.

Its aim is to develop cultural and educational activities in order to facilitate access to knowledge for everyone and promote social ties and exchanges between members, as well as between the University and the Rodez population. The association belongs to the network of U3As and is open not only to seniors but also to everyone, although in practice most of its members are seniors.





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As an association it has rules similar to those of the Melbourne U3A Association. Its directors and committee members, elected by the members during General Meetings, are responsible for operational decisions.

Rodez IUT provides the facilities and remunerates the teachers of the University of Free-time. The University of Free-time is free for the students and staff of Rodez IUT.

Orleans University of Third Age Affiliated with Orleans University (France)

Orleans' University of the Third Age founded in 1977 was later renamed Orleans' University of Free Time (UFT). Orleans UFT is a branch of Orleans University of Arts and Literature within the lifelong education programs of the University but is financially separate.

- Over the years, other Universities of Free Time were founded in neighbouring towns. These UFTs signed a joint-agreement with the Orleans University of Free Time and by extension with Orleans University itself. Today, **there are nine Universities of Free Time affiliated with Orleans University and its UFT.**



This UFT network accounts for 2,800 members. An agreement was drawn up between UFTs and it allows student members to access a greater variety of lectures, meet other members and enjoy trips together.

They are free to establish their own programs and set subscription fees. Although they might charge different fees, in reality all UFTs charge similar prices – between €30 and €40. The subscription allows access to lectures as well as other activities. However, gymnastics, language, art or IT courses are charged separately between €14 and €190.



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II. The British Model:

Universities of Third Age Registered as Local NGOs





The British model is based on local initiatives mainly registered as associations and NGOs with membership to a National or Regional Organization.

Three examples are described in this section:

- The British Third Age Trust (United Kingdom)
- The Melbourne University of the Third Age (Australia)
- The Lignano University of the Third Age (Italy)

1. The British Third Age Trust (United Kingdom)



There is no law in the United Kingdom regulating senior education or lifelong learning. The British State has little involvement in the British U3A movement neither on the governmental or local level and U3As are mostly independent associations. However, there is a national representative body for U3As in the UK, which is called the Third Age Trust.

a. Presentation of the Third Age Trust

The Third Age Trust¹ is a **Charitable Company Limited by Guarantee** incorporated and registered as a charity in 1983. It is managed by a National Executive Committee and consists of a chairman, three other officers and 12 representatives from the UK regions. The Third Age Trust is funded mainly by annual subscriptions from member U3As, with the occasional grant for specific projects. It has seven full-time and seven part-time staff located in Bromley. There are now 950 U3As in the UK and 350,000 senior members. Only the members of the Third Age Trust can use its registered logo.

Rules and principles of the Third Age Trust

The Third Age Trust's mission is to:

- facilitate the growth of the U3A movement
- provide support for management and learning in U3As
- raise the profile of the U3A movement
- promote the benefits of learning in later life through self-help learning

¹ <http://www.u3a.org.uk/>



The British U3A movement is non-religious and non-political and has three main principles:

i. Third Age Trust rules

- membership of a U3A is open to all in their third age, which is defined not by a particular age but by a period in life in which full time employment has ceased
- members promote the values of lifelong learning and the positive attributes of belonging to a U3A
- members should do all they can to ensure that people wanting to join a U3A can do so

ii. The Self Learning Principle

- members form interest groups covering as wide a range of topics and activities as they desire; by the members, for the members
- no qualifications are sought or offered. Learning is for its own sake, with enjoyment being the prime motive, not qualifications or awards
- there is no distinction between learners and teachers; they are all U3A members

iii. The Mutual Aid Principle

- each U3A is a mutual aid organisation, operationally independent but a member of the Third Age Trust, which requires adherence to the guiding principles of the U3A movement
- no payments are made to members for services rendered to any U3A
- each U3A is self-funded with membership subscriptions and costs kept as low as possible
- outside financial assistance should only be sought if it does not imperil the integrity of the U3A movement

iv. National Associate Membership Scheme



The Third Age Trust also provides a National Associate Membership Scheme. This scheme is available to people who want to join a U3A but do not currently have a local one, or people who are looking towards retirement from full-time work and want to join a local group as soon as they can. This scheme provides members with access to the U3A diary, copies of *Third Age Matters* and copies of the educational bulletin *Sources* mailed directly to them. It costs £10 per annum.



2. Melbourne University of the Third Age (Australia)

a. General information

Melbourne City's University of the Third Age is the oldest University of the Third Age in Australia, established as a result of a public meeting in July 1984. It is a self-funded, voluntary organization formed to provide learning opportunities to members aged 50-plus who are retired or not working full-time. It is incorporated as an association with currently over 850 members.

As a U3A following the British model, its critical features are self-determination and self-help principles. A management committee is elected annually from the members, and volunteers are responsible for administration and tutoring. However, every member should at some time contribute to the extent that they are able to.

The Association's rules

i. Aims of the association

The Association has the following main aims:

- educational programs and opportunities for lifelong learning
- programs which advance healthy, active and positive ageing through social inclusion and engagement
- opportunities to share knowledge, skills and experience

ii. Financial year

The Association's financial year covers a 12-months period ending on the 30th September.





iii. Powers of the Association

The Association has the following powers:

- subject to the Act (Australian Associations Incorporation Act), the Association has power to do all things incidental or conducive to achieve its purposes
- without limiting the sub-rule, the Association may:
 - acquire, hold and dispose of real or personal property
 - open and operate accounts with financial institutions
 - invest its money in any security in which trust monies may lawfully be invested
 - raise and borrow money on any terms and in any manner as it thinks fit
 - secure the repayment of money raised or borrowed or the payment of a debt on liability
 - appoint agents to transact business on its behalf
 - enter into any other contract it considers necessary or desirable
 - make rules binding on members as to their conduct in relation to the activities of the Association
- The Association may only exercise its powers and use its income and assets including any surplus for its purposes.





iv. Disciplinary Action

- the Association may take disciplinary action against a member if it is determined that the member:
 - has failed to comply with these rules; or
 - refuses to support the purposes of the Association; or
 - has engaged in conduct prejudicial to the Association
- if the Committee is satisfied that there are sufficient grounds to take disciplinary action against a member, the Committee must appoint a disciplinary subcommittee to hear the matter and determine what action, if any, to take against the member
- the members of the disciplinary subcommittee may be Committee members, members of the Association or anyone else, but must not be biased against, or in favour of, the member concerned
- before disciplinary action is taken against a member, the Secretary must give written notice to the member:
 - stating the Association proposes to take disciplinary action against the member
 - stating the grounds for the proposed disciplinary action
 - specifying the date, place and time of the meeting at which the disciplinary subcommittee intends to consider the disciplinary action (the disciplinary meeting)
 - advising the member that he or she may do one or both of the following 1) attend the disciplinary meeting and address the disciplinary subcommittee at that meeting 2) give a written statement to the disciplinary subcommittee at any time before the disciplinary meeting
- the notice must be given no earlier than 28 days, and no later than 14 days, before the disciplinary meeting is held
- at the disciplinary meeting, the disciplinary subcommittee must:
 - give the member an opportunity to be heard
 - consider any written statement submitted by the member
- the disciplinary subcommittee may:
 - take no further action against the member or
 - reprimand the member, or
 - suspend the membership rights of the member for a specified period, or
 - expel the member from the Association
- the disciplinary subcommittee may not fine the member
- the suspension of membership rights or the expulsion of a member by the disciplinary subcommittee under this rule takes effect immediately after the vote is passed



- a person whose membership rights have been suspended or who has been expelled from the Association may give notice to the effect that he or she wishes to appeal against the suspension or expulsion
- the notice must be in writing and given to the disciplinary subcommittee immediately after the vote to suspend or expel the person is taken, or to the Secretary not later than 48 hours after the vote
- if a person has given notice, a disciplinary appeal meeting must be convened by the Committee as soon as practicable, but in any event not later than 21 days, after the notice is received
- notice of the disciplinary appeal meeting must be given to each member of the Association who is entitled to vote as soon as practicable and must:
 - specify the date, time and place of the meeting
 - state the name of the person against whom the disciplinary action has been taken
 - state the grounds for taking that action
 - provide the background to allow members to uphold or revoke the decision to suspend or expel the person
- at a disciplinary appeal meeting:
 - no business other than the question of the appeal may be conducted
 - the Committee must state the grounds for suspending or expelling the member and the reasons for taking that action
 - the person whose membership has been suspended or who has been expelled must be given an opportunity to be heard
- the members present and entitled to vote at the meeting must vote by secret ballot on whether the decision to suspend or expel the person should be upheld or revoked
- a member may not vote by proxy at the meeting
- the decision is upheld if at least three-quarters of the members voting at the meeting vote in favour of the decision

v. Financial Matters

Financial matters are described in the following chapter on Sources for Financial Support for U3As.

vi. General Matters

- the Association may have a common seal
- if the Association has a common seal:
 - the name of the Association must appear in legible characters on the common seal
 - a document may only be sealed with the common seal by the authority of the Committee and the sealing must be witnessed by the signatures of two Committee members





- the common seal must be kept in the custody of the Secretary
- the registered address of the Association is:
 - the address determined from time to time by resolution of the Committee
 - if the Committee has not determined an address to be the registered address— the postal address of the Secretary
- any notice required to be given to a member or a Committee member under these rules may be given:
 - by handing the notice to the member personally
 - by sending it by post to the member at the address recorded for the member on the register of members
- any notice required to be given to the Association or the Committee may be given:
 - by handing the notice to a member of the Committee
 - by sending the notice by post to the registered address
 - by leaving the notice at the registered address
 - if the Committee determines that it is appropriate in the circumstances
 - by email to the email address of the Association or the Secretary
 - by facsimile transmission to the facsimile number of the Association
- members may on request inspect free of charge:
 - the register of members
 - the minutes of General Meetings; the financial records, books, securities and any other relevant document of the Association, including minutes of Committee meetings
- the Committee may refuse to permit a member to inspect records of the Association that relate to confidential, personal, employment, commercial or legal matters or where to do so may be prejudicial to the interests of the Association
- the Committee must on request make copies of these rules available to members and applicants for membership free of charge
- a member may make a copy of any of the other records of the Association referred to in this rule and the Association may charge a reasonable fee for provision of a copy of such a record
- for purposes of this rule— relevant documents means the records and other documents, however compiled, recorded or stored, that relate to the incorporation and management of the Association and includes the following:
 - its membership records
 - its financial statements



- its financial records
- records and documents relating to transactions, dealings, business or property of the Association
- the Association may be wound up voluntarily by special resolution
- in the event of the winding up or the cancellation of the incorporation of the Association, the surplus assets of the Association must not be distributed to any members or former members of the Association
- subject to the Act, the surplus assets must be given to a body that has similar purposes to the Association and which is not operated for the profit or gain of its individual members
- the body to which the surplus assets are to be given must be decided by special resolution

Alteration of rules: These rules may only be altered by special resolution of a General Meeting of the Association





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Comparison between the French Model and the British Model

III. Comparison between the French Model and the British Model





The French UFUTA (French Union of All-Ages Universities) and the British Third Age Trust have many principles and aims in common. For instance, they both stress the concept of learning for the sake of learning and reject the idea of qualifications (formal certifications). However, they also have major differences:

1. The link with Universities

According to the French model of U3A, the term 'University' in 'University of the Third Age' implies a link with a higher education institution such as a university. This link between Universities of the Third Age and higher education establishments is a membership criterion to join UFUTA. To become a member of UFUTA, a U3A must be a department of or unit in a higher education establishment or affiliated with one.

This is not the case for the British Third Age Trust. According to the British Third Age Trust the term 'University', in 'University of the Third Age', is used in its original sense of people coming together to share and pursue learning in all its forms. It means that U3As may not have a link with higher education establishments. U3A activities usually take place in Community Centers. Sometimes, they take place in the members' own homes. This model is common not only in Britain but in most of the English Speaking countries such as the United States, Australia or New Zealand.

2. Pedagogy and Research

The link between UFUTA and the higher education system is also clearly expressed through its willingness to promote research and pedagogy in senior education. UFUTA is located at the CLEIRPPA 'Center of Links, Studies, Information and Research on the Problems of Elderly People'. One of its main aims is to *'create and coordinate collective programs on pedagogy, research, social action, in order to promote the development of lifelong learning'*. The British Third Age Trust does not indicate any intention of promoting research on senior education.

The French model is a top-down model where scientific research is implemented by experts to determine the best programs for the elderly. The British model is a bottom-up model where programs are decided more democratically by members according to their own taste.





3. Lobbying and Official Recognition of U3As

The aims of the French UFUTA include *'coordinate actions towards the Public Authorities, particularly in order to obtain official recognition of the member organizations'*.

In France, education is generally funded by the State, including lifelong education. In 1968, following the French events of May 1968, amendments to the Higher Education Act stated that 'French Universities had to open up to all categories of the population'. In 1971, a new law allowed French Universities to fund adult education. These laws were used to fund senior education as part of lifelong learning. In addition, French municipalities have the right to fund Associations, which are officially recognized as organizations serving the public good (associations d'utilité publique).

Therefore, U3As in France can receive financial support from the State both through universities and through subsidies for associations. As a consequence, there is a strong incentive for U3As to be officially recognized by the State. There is also a necessity to ensure that the State maintains or increases its financial support. Lobbying Public Authorities is therefore one of UFUTA's main functions.



In the United Kingdom, there is no law promoting lifelong learning or senior education. British Public Universities have no obligation to fund lifelong education. Until 2013, lifelong learning was mainly organized by the Sector Skills Council, an employer-led organization. Since then, it has been organized by the LSIS (Learning and Skills Improvement Service), which is a charitable organization. The purpose of the LSIS is to train people in order to facilitate their career change. Retired people are not entitled to benefit from the LSIS services. British seniors cannot benefit from lifelong learning programs or government aid. Therefore, British U3As have little incentive to lobby or obtain official recognition from the State. This is why lobbying does not feature in the rules of the Third Age Trust.

However, the Third Age Trust is made up of 12 representatives from the regions in the UK. Therefore, there is some government support for British U3As. This support comes mainly in the form of provision of public facilities such as Community Centers.



4. Conditions of Admission

Apply for U3A
Membership

In the British model, there is a no clear definition of the Third Age and no clear age condition for admission. The main condition is the end of full-time employment.

'Membership of a U3A is open to all in their Third Age, which is defined not by a particular age but by a period in life in which full time employment has ceased.'

In France, there are several conditions of admission to U3As. Originally U3As were open only to pensioners (as it is still the case in Toulouse U3A). However, in the late 70's, different U3A approaches emerged. The original focus on older people broadened to include other educationally disadvantaged groups. In many places, programs were advertised for early retirees, housewives, the unemployed and those with physical handicaps. Besides, the concept of 'Third Age' was increasingly regarded as negative. Therefore, the admittance criteria were removed and these new U3As were opened to anyone. They were renamed, for example, University of Leisure Time or University of Inter-Age. However, in spite of being accessible to anyone, the profile of members did not change much and remained primarily made up of pensioners.

5. Teachers and Learners

The main characteristic of the British model is the 'Self Learning Principle'. As stated by the rules of the British Trust:

'There is no distinction between the learners and the teachers; they are all U3A members.'

This principle is based on the fact that many U3A members are retired teachers or have specific skills that they can teach to other members. This is a way to reduce the costs of operating U3As as elderly teachers are not remunerated - they are volunteers. However, this model requires strong commitment of its members and might not work if senior members do not want to or are not capable of teaching.

The top-down French model is costlier but also ensures more formal and qualitative courses as most teachers are professionals.





IV. Funding of Universities of the Third Age



The way Universities of the Third Age are funded depends on which of the three models of U3A organization they follow. The French, British and Chinese U3A models, differ in the way they divide and charge their services to their senior students.

- **The French model**

The French U3A model distinguishes between:

- basic services which are accessible on payment of the subscription fees
- extra services which are only available by paying extra fees on top of the subscription fee (in some instances subscription fees are cheaper for couples)

The basic services offered by French Universities of Third Age are charged from €60 up to €150 a year (at Toulouse University of the Third Age the fee is €100 a year) and include:

- two 2-hour lectures per week
- one hour of gymnastics or walk per week
- one guided tour per month
- access to the library

In Toulouse, additional fees are charged for extra services that include:

- Tai chi
- information technology
- English
- Spanish
- drawing and painting
- extra tours or meals

- **The British model**



As the British model relies heavily on volunteering and the cost of courses is kept low, there is not much difference between basic and extra services. Generally, members just pay a subscription fee, which gives them access to all available courses, without having to pay extra, except for certain tours. However, the number of courses that can be attended may be limited. For example, Cambridge U3A limits members to six courses in small groups a year although they have unlimited access to lectures in main lecture halls (once or twice a week).



- **The Chinese model**



In contrast to the British model the Chinese model is purely 'à la carte'. Whether U3As are public and largely funded by the Local Government or private and solely funded by the student fees, there is never a distinction between basic or extra services. In the Chinese model the subscription fee is extremely low with the cost of the student card at just RMB 10 or RMB 20. Courses are charged to students on an annual or semester basis. Therefore, the model is very flexible as students only pay for courses that they are interested in.

These three models show the different funding mechanisms that exist to support the operation of Universities of Third Age. These are funding by:

- the State and/or local authorities
- universities
- through senior students' fees

1. Funding by the State or Local Authorities

In several countries public authorities directly fund Universities of the Third Age usually through administrations such as Regional Governments like in Shandong (China) or through Municipalities like in Lignano (Italy) and Royan (France).

a. Shandong University of the Third Age (China)

The Government of Shandong Province considerably funds Shandong University of the Third Age. Every year the U3A receives approximately 16 million RMB to fund its operational costs, which include:

- teachers' wages (180 teachers)
- staff wages
- office supplies
- electricity, water, heating, and other utility costs

The U3A receives an additional 10 million RMB from its 19,000 students. Furthermore, the Province pays for the salaries of 36 government employees working for Shandong U3A. The buildings and the materials were also entirely funded by the Province.

Shandong U3A has four different locations. Each area comprises one or several buildings. In 2015, the Province provided 300 million RMB for the construction of very modern 41,000m² building for Shandong U3A. It also contributed 70 million RMB for the provision of materials and equipment such as tables, chairs,



computers, and so on.... The U3A is exclusively available to retired civil servants who served at the Provincial Government.

The budget for Shandong U3A is submitted annually to the Provincial People's Congress by the Provincial Financial Department. If the local People's Congress does not ratify the budget, the local Financial Department can resubmit another budget.

Lignano Sabbiadoro University of the Third Age (Italy)

Lignano Sabbiadoro University of the Third Age receives funds from the municipality for facilities. To operate, Lignano Sabbiadoro University of the Third Age generates income from the following sources:

- membership fees, the amount of which is determined annually by the Board of Directors
- registration fee fixed annually by the Executive Council
- contributions and grants from public and private bodies
- movable and immovable property of the Association
- donations

Lignano U3A's head office is located at a villa provided by the municipality after the State requisitioned it from its previous owner for outstanding debts. The rooms in the villa have been converted into classrooms.

2. Funding Provided by Universities

The first University of the Third Age was created in Toulouse with the support from the outset from Toulouse public university. This funding mainly covers the office, classrooms and equipment such as computers and the secretariat. Fees are charged on registration of senior students, which contribute to operational expenses.

Toulouse U3A is located within Toulouse University. In the 2015/2016 financial year, most of its expenditure was covered by money contributed by its senior students through registration and extra course fees, approximately €60,000. However, Toulouse University also financially supports the U3A covering the following areas:

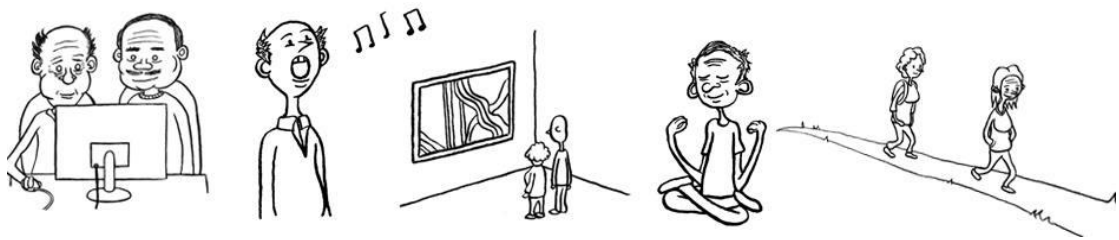
- the U3A's office which also includes an area for the secretary, an area for six or seven interns or volunteers who occasionally work there, a library dedicate to seniors, as well as the Director's office
- Materials and equipment such as computers, tables and chairs, a photocopier, printers, cupboards, etc.
- Until recently it provided the U3A with classrooms and lecture halls for free. However, since 2015, a decree from the University has changed this rule. Henceforth, the U3A will rent classrooms and lecture halls from the University
- the secretary's salary (including social security contributions)



Comparison between the French Model and the British Model

other minor services provided free of charge by the University include the University's website², the services of the accountancy department and the human resources department

These financial contributions from the Parent University allow Toulouse U3A reduce its costs and the fee it charges the students.



3. Funds Contributed by U3A Students

Funds contributed by senior students through their subscription fee and payment for extra activities constitute additional income for Toulouse U3A (France) and Shandong U3A (China) and are the main source of funding for Bratislava U3A (Slovakia), Cambridge U3A (United Kingdom) and Melbourne U3A (Australia).



a. Toulouse University of the Third Age (France)

Toulouse U3A senior students paid an annual subscription fee of €100 for the 2015-2016 academic year. This allows them access to:

- lectures (2 sessions a week of 1 hour 30 minutes each)
- soft gymnastics or walking sessions (1 hour per week)
- short guided tours (once a month)
- the U3A library

² <http://www.ut-capitole.fr/formations/se-former-autrement/formation-continue/presentation-activites-u3a-356657.kjsp>



There are additional optional activities for additional payment such as:

- languages (1 hour 30 minutes week), charged at €300 / year
- information technology (1 hour 30 minutes a week), charged at €300 / year
- Tai chi (1 hour a week), charged at €100 / year
- drawing and painting (1 hour a week), charged at €100 / year
- self-defence (1 hour per week), charged at €100 / year
- tours to nearby cities and towns, charged at between €30 to €60 per trip
- international tours (once a year for AIUTA meetings)
- Christmas meal, charged at €35



At Toulouse University of the Third Age, registration is free for retired employees of Toulouse University. There is an agreement between the U3A and Toulouse University to provide U3A complimentary services to their ex-employees.

Income from fees is processed by the University's accountancy service and kept in the university's bank account. This amount belongs to the U3A except for 10%, which is kept by the university as U3A's contribution to the parent university. The students' subscription fees are usually sufficient to fund most of the U3A's expenditure, including professors and teachers' salaries, the cost of activities (transport, entrance fees), rental of rooms, cleaning costs, office supplies, electricity, telephone, and so on...

The Director of the University of the Third Age in Toulouse does not receive additional income for his work as director of the U3A as he receives a salary from the university as a professor of the university. However, the university remunerates the U3A's secretary out of its budget, not out of the U3A's budget. The salaries of lecturers (€61.35/hour + social security contributions) and of workshop teachers (€40.91/ hour + social security contributions) are the U3A's main expenditure. They account for 70% of total expenditure.



Although it is mainly funded through Government subsidies, Shandong U3A also charges students fees to participate in the activities it offers. Course fees range between 220 RMB and 800 RMB a year for a 1 hour 40-minute class each week. There are 64 sessions a year. Incomes from courses total 10 million RMB a year.

University of the Third Age in Bratislava (Slovakia)

Adult education after the political changes in Slovakia in 1990 is generally not free of charge. The pricing level of the subscription fee at the Comenius University U3A is decided jointly by the University and by the



U3A's Director. As a result, student fees differ from U3A to U3A. The amount of the subscription fee also depends on whether the U3A has other sources of funding or not.

The subscription fees of the U3A are:

- €65 for pensioners
- €75 for working persons over 50

This subscription fee gives access to every lecture and course organized by the U3A, which is quite different from the French model because there is no extra fee for optional courses. Therefore, the U3A at Comenius University is more like British U3As.

Receipts from the fees are sent to the Centre for Continuing Education at Comenius University's bank account and used to pay for the expenditure of the U3A, which are mostly teachers and the U3A staff's salaries. Fees also cover international activities, travel costs and all general expenses. Comenius University faculties provide the classrooms and lecture halls free of charge.

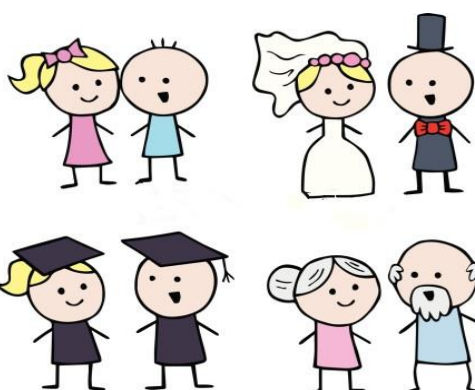
Cambridge University of the Third Age (England)

Cambridge University of the Third Age was founded in 1982 and is the oldest and one of the largest Universities of the Third Age in Britain. It is also the first to introduce a new model of U3As based on volunteering – the British (or Cambridge) model of U3As.

Members of Cambridge U3A pay a £60 annual subscription fee. Unlike Toulouse U3A, this subscription fee covers lectures (once a week) as well as up to 6 classes a year (such as languages, discussion groups, etc.) and visits that are arranged throughout the year. New members must pay an additional fee of £5 if they apply to the U3A for the first time. They also have the possibility of receiving U3A programs by post. For this service they pay an extra £4. Toulouse U3A charges additional fees for some courses whereas Cambridge U3A does not but sets a limit to 6 classes per year. The members can also make a donation to their U3A when they complete their application form.

Cambridge U3A is entirely financed by its members. As it is not located in a University, it uses a wide variety of venues to hold its courses and activities. In 2015, Cambridge University used 43 different venues. It uses its own premises (the Cambridge U3A premises) as well as amongst others:

- Magdalene College
- All Saints Church Hall
- Cambridge and Country Bowling Club
- Cambridge Buddhist Centre
- Cambridge University Botanic Garden
- Debating Chamber, Union Society
- Institute of Astronomy
- Scout HQ





- Rock Road Library, etc.

Usually these premises are provided free of charge by their owners or managers, whether they are public or private premises.

Cambridge U3A's courses and lectures are mostly delivered by the members themselves. Usually these are retired teachers and retired professors. Therefore, the cost of Cambridge U3A is very low. The subscription fee of £70 is mostly used to pay for the U3A's office staff, premises, material and supplies.

Melbourne University of the Third Age (Australia)

As in Britain, there is very little involvement by the Australian Government to support senior education. Most of the funding comes from the U3A members themselves. Melbourne U3A operates in a very similar way to the Cambridge U3A. The detailed description of its financial arrangements is in its rules which states:

'The funds of the Association may be derived from joining fees, annual subscriptions, donations, fund-raising activities, grants, interest and any other sources approved by the Committee'.

The management procedure of the funds is described as follow:

- the Association must open an account with a financial institution from which all expenditure of the Association is made and into which all of the Association's revenue is deposited
- subject to any restrictions imposed by a General Meeting of the Association, the Committee may approve expenditure on behalf of the Association
- the Committee may authorise the Treasurer to expend funds on behalf of the Association (including by electronic funds transfer) up to a specified limit without requiring approval from the Committee for each item on which the funds are expended
- all cheques, drafts, bills of exchange, promissory notes and other negotiable instruments must be signed by two Committee members
- all funds of the Association must be deposited into the financial account of the Association no later than five working days after receipt
- with the approval of the Committee, the Treasurer may maintain a cash float provided that all money paid from or paid into the float is accurately recorded at the time of the transaction
- the Association must keep financial records that:
 - correctly record and explain its transactions, financial position and performance
 - enable financial statements to be prepared as required by the Act
- the Association must retain the financial records for seven years after the transactions covered by the records are completed.
- the Treasurer must keep in his or her custody, or under his or her control:



- the financial records for the current financial year
- any other financial records as authorised by the Committee
- for each financial year, the Committee must ensure that the requirements under the Act relating to the financial statements of the Association are met
- those requirements include:
 - the preparation of the financial statements
 - if required, the review or auditing of the financial statements
 - the certification of the financial statements by the Committee
 - the submission of the financial statements to the Annual General Meeting of the Association
 - the lodgement with the Registrar of the financial statements and accompanying reports, certificates, statements and fee

4. Other Sources of Funding

a. EU Programs: Slovakia Universities of the Third Age



Slovakia U3As has had access to EU structural funds since 2004. However, the Ministry of Finance imposed very strict and complicated procedures to apply for the funds. As a result, few applications to access the European funds have been made.

In spite of these complications, the U3As supported by the Slovakia Association of Universities of the Third Age (ASUTV) took advantage of this opportunity when the Slovak Republic's Ministry of Education, Science, Research and Sport announced a call for funding from the **Operational Program Education**³ (2007-2013) for senior education.

The Operational Program Education covers all levels of the educational system including further education. Calls for proposals in 2012 were oriented to senior's learning and its innovation and development at the U3A in cooperation with the municipalities. Between 2013 and 2015 the nine U3A applications were approved, each amounting to around €150,000. The U3As prepared innovative projects focusing on older persons such as the development of the 'Rural University' at the Slovak agricultural University in Nitra, and a project to evaluate the quality of senior learning processes, implemented by the University of Konstantinus Philosopher in Nitra.

³ <http://www.nsrr.sk/en/operational-programs/education/>



The new **Erasmus+** program is an EU Program focusing on education, training, youth and sport for the period 2014 to 2020. The U3A at Comenius University was successful in the first Erasmus+ call in 2014 as well as winning the **EduSenNet** project (Educational Senior Network). This project is in the KA2 category (Key Action 2) entitled '*Strategic Partnership for Adult Learning*'. The project is shared by shared European Universities and their U3As.

The EduSenNet project aims to identify both the specific needs of older learners aged over 50 and the conditions under which they learn. The project examines opportunities for innovation, how they may be undertaken and by whom. The project coordinator is Nadežda Hrapková from Comenius University and its U3A.



The objectives of the project are to:

- summarise experiences in publications
- encourage older people to take part in learning activities
- develop interest in learning through participation in activities designed to promote and extend knowledge and skills
- include older students by utilising their knowledge
- innovate U3A programs or establish new programs for new groups of older persons



The Erasmus+ General Call for Proposals for 2016 has been published, along with a corrigendum to the dates for Key Action 1 and 2. The deadline for strategic partnerships in the field of education is March 31st, 2016. The maximum grant awarded for the Strategic Partnership for all partners working together is €150,000 per year.

The Erasmus + program guide provides information on:

- the priorities of the Program
- the actions supported
- the funding available for different actions
- detailed information on participation

Organizations submit applications online to the National Agency the project coordinator's country.

Today, the calls for ERASMUS+ projects are increasingly focused on adults learning and their inclusion in the labor market. According to applicants who have previous experience in successfully bidding for Grundtvig projects, it is becoming difficult for institutions dealing with projects involving seniors to obtain funds.



Donations

Cambridge University of the Third Age includes the possibility of donating money to the organization on its membership application form. These donations are tax deductible.



International Association of Universities of Third Age

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Payment boxes on the Cambridge U3A membership application form, including a box for donation.

	£	£
New member enrolment fee:	5.00 <input type="checkbox"/>(not due if you have previously been a member of U3AC)
Annual subscription:	60.00 <input type="checkbox"/>(from January to September)
Programme / Postage:	4.00 <input type="checkbox"/>
Additional course fees (where applicable)	<input type="checkbox"/>
Donation	<input type="checkbox"/>
Total:	_____	

Lille University of Free Time (France) also provides the opportunity to donate both on its application form and on its website. In France, 66% of donations are tax deductible up to an amount 20% of income. Therefore, if a person's annual income is €20,000, up to €4,000 a year can be donated and €2,640 deducted from income tax.

