



U3A Alliance Australia

Patron: The Hon. Dr Barry O Jones, AO

SUBMISSION to the ADVISORY PANEL ON THE ECONOMIC POTENTIAL OF SENIOR AUSTRALIANS

U3A Alliance Australia (U3AAA) is grateful to have the opportunity to make this submission to the Advisory Panel. U3AAA is comprised of State/Territory U3A Networks across Australia, and U3A Online Inc. We have about 70,000 individual members¹ in over 230 U3A groups spread across the nation. The role of U3AAA is to foster closer cooperation between U3As across Australia, and to present a national standpoint on issues of interest to U3A's.

The work of the Advisory Panel is most timely, as the Prime Minister has recently² announced that the Government will be making major changes to the aged care sector with the aim of keeping retirees in their own homes as long as possible, while helping them to stay “active and engaged members of the community.” Therefore, it is equally important that there are policies that ensure that older people are encouraged to remain active and engaged in their communities. We are aware of the range of policy areas that the Panel will be considering.

Much of the current discussion on the Ageing Population exhibits a preoccupation with treating senior members of the community as either a passive sector requiring direct support (eg welfare or health services recipients); or of value only if they can be retained within the paid workforce; or as a market sector requiring commercial services to maintain an active lifestyle. Many if not most older people cannot afford commercial courses or expensive physical exercise regimes or travel packages.

It is our view that economic productivity is not limited to the opportunity for older members of the community to continue in the full- or part-time workforce, although we agree that failure to provide that opportunity deprives the community of valuable skills and experience. However, in reality, many senior Australians do not wish to return to paid work, but will continue to provide their skills and experience in a voluntary capacity in ways which add considerable value to the economic productivity of the nation. This contribution is worth millions of dollars to the Australian economy³. We contend that

¹ Members include former teachers, university academics, nurses, business women, public servants, tradespeople, technicians, bookkeepers, secretaries, lawyers and others who bring and share their experience, skills and knowledge and learn from each other. Most are in the 60s, many are in their 70s, some 80s or even 90s. Some however, are 45- 60 year-olds who have been made redundant in the workforce, or are unable to work through disability. Many also contribute as subjects to university research studies on health, and positive ageing.

² As announced in the *Sydney Morning Herald*, 5 August 2011, p. 3

³ In terms of U3A, a 2008 survey calculated the worth of U3A volunteerism, at a nominal rate of \$20 per hour, as \$ 21million [Research Study U3As in Australia and New Zealand, R Swindell, Griffith University]

this form of productivity needs to be recognised and encouraged through positive government policies.

Our example is U3A (University of the Third Age), a world-wide movement which came to Australia in the early 1980s. It provides intellectual stimulation and social interaction possibilities for people who are retired or semi-retired – in their so-called ‘Third Age’ – by and for volunteers using their experience and skills to teach and learn together⁴. U3As are not-for-profit organizations, and they make an important contribution to economic productivity in various ways

First and foremost, they provide opportunities for members to be intellectually stimulated and to encourage life-long learning to learn new skills, both creative and life-skills. There is a considerable body of research which shows that such stimulation, in particular in the creative arts, physical exercise, gardening, music, and critical thinking activities, can defer or reduce the likelihood of the onset of dementia. Such preventative health dimensions result in a lesser burden on the public purse in that seniors so involved lead positive and active lives, and are less likely to require expensive medical care.

Secondly, it is well-known that social isolation affects many seniors in our community, particularly those who live alone (it has been claimed that up to 20% of older people are thus affected⁵), which is often linked with depression. However, research indicates that seniors who report a high level of social activity are about twice as likely to remain disability-free when it comes to activities of daily living, and are also about 1.5 times as likely to remain free of disabilities that affect instrumental activities⁶. U3A groups play a major role in that their activities offer safe and positive social environments in which seniors can be socially involved.

Turning to specific terms of reference for the Panel, we would like to direct specific comments and suggestions to four of these:

1. Cultivating positive attitudes towards senior Australians:

Recently, Dr Jane Barratt, the Secretary General of the International Federation on Ageing argued that we must ensure “... *the rights of all to access health care, health promotion and prevention programs, food and social benefits*”. She noted that healthy older people also represent a resource for their families, communities and economies, and that investing in preventative health policies produced dividends for societies everywhere, and that “ *the notion of aged-friendly communities was a good one... but is not seen as something tangible. It has been documented that the more and more people in aged care are talked over, at and around, and not to, they become disconnected, isolated and may stop engaging.*”⁷

⁴ A DVD, prepared by the U3A Network NSW, which illustrates the role and activities of U3A can be accessed via www.nsw.u3anet.org.au or www.youtube.com/watch?v=RMV2HFHF72w

⁵ As reported in the *Illawarra Mercury*, 6 July 2011, p11

⁶ Bryan D. James, Patricia A. Boyle, Aron S. Buchman, David A. Bennett, *Relation of Late-Life Social Activity With Incident Disability Among Community-Dwelling Older Adults..* J Gerontol A Biol Sci Med Sci, February 7, 2011

⁷ As reported in *The Senior News*, June 2010, p9

Further, Commissioner Elizabeth Broderick also recently expressed her concern that many prevailing community attitudes and stereotypical views of seniors are based on false and destructive assumptions and she has called on the need to identify, expose and eradicate these assumptions⁸. It is hoped that the recently appointed Commissioner for Age Discrimination will work to alleviate problems which affect some of the most vulnerable people in our community, and to dispel the stereotypes.

The U3A movement is also prepared to work with other relevant organizations including COTA, Alzheimers Australia ('Mind Your Mind' program), the National Heart Foundation (walking groups) and regional multicultural associations (to encourage CALD participation).

2. *Fostering opportunities for business and community groups to provide a wider range of services and support healthy and active lifestyles for seniors:*

Equally, there are opportunities through Local Government to support healthy and active lifestyles for seniors, but they will need Commonwealth Government support for this. As examples, we refer to the lighthouse project Positive Ageing Policy introduced by the Cardinia Shire (Victoria)⁹ and the World Health Organisation Age-Friendly Cities Project which has been adopted by Melville City (WA) and Canberra (ACT)¹⁰, which encourage a positive approach to policy development for senior Australians. Two specific areas in which much could be achieved at the local level in conjunction with Local Government are providing gymnasias¹¹ and wellness clinics; and encouraging the provision of a wide range of activities ranging from the creative arts to bushwalking and environmental pursuits.

3. *Opportunities created by the National Broadband Network :*

U3AAA supports the expansion of opportunities to enable seniors to access and receive training in the use of internet technology, for both lifelong learning and social networking. We are aware that Dr. Rick Swindell of U3A OnLine has spoken with the Panel on the potential of offering courses online: U3A OnLine is a member of U3AAA.

We would also encourage Government to support independent producers of intellectually stimulating and relevant material aimed at older people, eg social history which can link them to their own experience, to enable them to maintain their cognitive abilities and computer skills. This is especially important for social inclusion, for those people who are for whatever reason, socially isolated.

⁸ Speech by Elizabeth Broderick, Sex-Discrimination and Commissioner Responsible for Age Discrimination (HREOC) at the Sydney Institute, 21 June 2011

⁹ *Cardinia Shire Council Positive Ageing Strategy Action Plan 2009-1012*, accessed at www.cardinia.vic.gov.au click on 'seniors'

¹⁰ www.who.int/ageing/publications/Global_age_friendly_cities.Gudie_english.pdf;
www.who.int/ageing/age-friendly_cities_network/en/index.html

¹¹ As has been done by Liverpool Council (NSW) and by the Older Women's Network, Sydney (NSW)

4 *Creating new avenues for senior Australians to volunteer:*

While valuable work is being done in this area by existing agencies, there clearly needs to be some bold initiatives whereby seniors including U3A members are encouraged to act as carers for the handicapped and disabled; to offer ESL tutoring to CALD groups including refugees; and to act as mentors and tutors to children with learning difficulties. Consideration could be given to expanding the Carers Allowance of \$50 pw. currently offered by Centrelink¹² to meet out-of-pocket expenses incurred in these supportive activities. Additionally, we should encourage retired professionals and tradesmen eg accountants, electricians, mechanics, Men's Sheds etc, to help aged pensioners with minor maintenance and other tasks for which they cannot afford to engage paid labour, with a similar allowance to meet out-of-pocket expenses.

Two Other Major Areas of Concern

Currently, there are two other areas of concern to many smaller volunteer groups, such as U3As, which are basically managed and maintained by pensioners or people on fixed superannuation pensions, and do not employ any paid staff.

The first is that they are currently ineligible for *Donor Gift Recipient* (DGR) status, and consequently ineligible for grants and sponsorships from commercial or philanthropic organisations to assist them to expand their operations. We are aware that the government has established a new commission to regulate the not-for-profit sector, but it needs to expand the definitions of 'educational institutions' and 'charitable purposes' to include community based, volunteer bodies such as U3A which provide valuable services for senior Australians outside of institutional situations, so that they can access funding to support their objectives.

The second is the *Work Health and Safety uniform legislation*: which is to come into effect nationally in 2012. This legislation provides that 'volunteers' are included in the definition of 'workers' who are protected under the Act. This is appropriate. It also provides exemption from the provisions of the Act in (s.5(8)) to a 'volunteer association' being "*a group of volunteers working together for one or more community purposes where none of the volunteers, whether alone or jointly with any other volunteers, employs any person to carry out work for the volunteer association*". But this section does not include or reference voluntary associations incorporated under relevant Associations Incorporations legislation, such as U3As and other voluntary community groups¹³, and consequently they are not exempted from the legislation, although in fact they may undertake similar activities.

¹² The payment would be limited to those volunteers who hold a Commonwealth Health card.

¹³ As U3A Network NSW has been advised by that State's Workcover Authority (26 July 2011) and other State U3A networks have had confirmed through their own enquiries. An exception is s. 144 of the Occupational Health and Safety Act (Victoria)

The logic of distinguishing between an unincorporated group of volunteers, and an incorporated group of volunteers, is not clear or rational. Incorporation is undertaken for good reason to create a legal entity which is required, among other things, for continuity of existence, the ability to obtain public liability insurance, and to obtain an ABN which is usually a requirement for even small grants, such as Seniors Week or Volunteer Equipment grants. Many such groups do not own or lease premises over which they have full control, but rent premises on an occasional basis to conduct their activities, yet such groups and their office-bearers are potentially liable under the Act for obligations or 'offences' affecting their own volunteers, but for which they are not directly responsible.

This is not to deny the importance of appropriate health, safety and risk management procedures, but the potential of the legislation is discriminatory, and may well deter many people from engaging in voluntary community activities, including support for disadvantaged members of the community of the kind described and encouraged above, if their volunteer officers are potentially liable for offences under the legislation. This is a very different situation from those large not-for-profit organizations which conduct commercial enterprises using paid as well as volunteer workers. We recommend that s. 5(8) should be amended to apply equally to incorporated community associations which are wholly managed and maintained by volunteers.

Legislative measures should enhance the ability to attract volunteers to contribute rather than impose deterrent or exclusionary provisions on individuals or their volunteer organizations.

We hope that the Panel will address these concerns in its deliberations, as they directly impact upon the potential of older citizens to continue to contribute to Australia's economic development, through the value of volunteer services to the community.

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On behalf of
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