



HOBSONS BAY | WILLIAMSTOWN



**REFLECTING TO MOVE AHEAD
— An Evaluation —**





1.0 EXECUTIVE SUMMARY

1.1 Why was the Evaluation conducted?

The U3A Williamstown Hobson Bay Committee determined that evaluating the outputs and outcomes from the activities of the organisation over the period of 2020-2022 would provide key insights and learnings from all of its major stakeholders as a key part of its Strategic Planning for the future. The key questions used in the evaluation tools were based around the U3A Hobsons Bay mission, vision and goals.

1.2 What methodology/tools were used to gather the information?

Both qualitative and quantitative tools were used to gather feedback from all key stakeholders. This included: Members, Convenors, External Stakeholders, the Committee and a cross section of randomly selected members who participated in an individual personal interview. A SWOT (Strengths, Weaknesses, Threats and Opportunities) exercise was conducted with all of the Convenors who attended the Convenor Workshop. The information collected from all sources was summarised using the SWOT format. The data collection tools used are attached in Appendix 1.

1.3 What are the key learnings?

Overall the feedback provided was very positive. A wide range of activities, a dedicated Committee, current venues, wide range of communication tools used and positive relationships with external partners were all seen as strengths. The key weaknesses identified related to communication with new members, lack of diversity, potential lack of venues, some of the current activities being full, lack of convenors for new activities and the complexities of the UMAS system. Key improvements identified were increasing the options for future venues, increase collaboration with external organisations focused on the ageing population in the community, increasing membership diversity, providing more support to convenors and investigate a range of methods for sharing the workload of the Committee more effectively with the wider membership. Key threats identified were reflected in opportunities for improvement and weaknesses. They included lack of venues, shortage of Convenors, future funding challenges, capacity of Committee to maintain current positive culture and membership numbers (both potential losses due to full courses and lack of new activities and rapid growth). The summary of the learnings from all of the data collected has been used to develop the key recommendations. A full list of the recommendations can be found in Section 9 of the report.

1.4 How will the learnings be used?

The Committee conducts an annual review of its goals, key activities, key roles and planning for the next year. The results of this Evaluation Project will be a key input into this process.

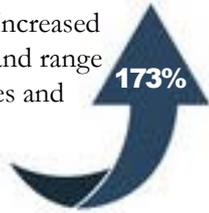
2.0 What is U3A Hobsons Bay/Williamstown?

2.1 Background Information

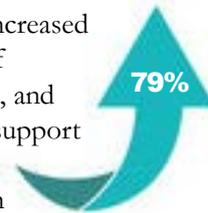
Vision	Mission
<p>Promote and celebrate positive ageing.*</p>	<p>Supporting positive ageing by meeting the needs of the retired and semi-retired members of our community for social interaction and learning opportunities.</p>
<p>Purposes of the wholly volunteer- based association are to:</p>	
<ul style="list-style-type: none"> • provide and promote the benefits and enjoyment of lifelong learning programmes, opportunities and activities for its members • encourage and enable retired and semi-retired persons to share their knowledge, skills, interests and experience with each other within a friendly and social environment of mutual co-operation and equality • participate in local community programmes, recognising the potential of mature-aged people and their value to society • foster partnerships and links with other U3A groups, community groups and organisations • support U3A Network, including participating in its operations 	
<p>Elements of Positive Ageing</p>	
<ul style="list-style-type: none"> • create a positive attitude • create a life with purpose and meaning • be respected and respectful • be connected to family, friends and society • be in touch with a changing world • be safe and secure at home and financially • be able to manage health issues including mental health • be able to get around 	

2.2 Goals

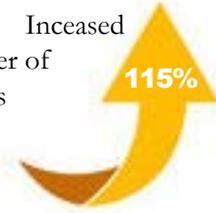
2.2.1 Increased number and range of courses and activities



2.2.2 Increased number of convenors, and improved support and interaction



2.2.3 Increased number of venues



2.2.4 Further develop partnerships with Hobsons Bay Council, Bayside Secondary College, and other organisations (Refer 2.4 below)

2.2.5 Increase funding to support and enhance the organisation’s activities.

- Incoming revenue related to enrolment fees has increased due to the increase in new members. Grant revenue is variable due to external availability. Income vs expenses is in a positive position. Both incoming and outgoing expenses were affected by the need to manage COVID. Detailed annual financial reporting is provided as part of the Annual General Meeting as per external requirements.

2.2.6 Apply learnings from ongoing review and reflection to ensure continuous improvement and demonstrated achievement of vision, mission, and purposes.

- A formal evaluation was undertaken which included all key stakeholders using a range of tools resulting in a comprehensive report.

2.3 Members

87%
increase in members



2.4 Partnerships*

What do our partners think?

- There has been increased and continued engagement with the organisation's key strategic partners. In general the feedback has been very positive and a strong platform has been established for future collaboration.

Bayside Secondary College

- Excellent working relationship with both the Principal and the Facilities Manager over the past 3 years
- Minor repairs undertaken and extra security added
- Agreement reached on long-term tenancy and any future changes will be negotiated within an agreed timeframe

Hobsons Bay Staff

- Invited to participate in the Dennis Reserve Development working party, focus group on recycling in the municipality and invitations to the election for the new Mayor.
- Included in closer cooperation around Senior's Week and other Council Activities.
- Invited in 2022 to relocate some of our activities to the Williamstown Senior Citizen's Building as a short-term solution to our shortage of venues. We became tenants which gave us preferred status in the new Community Hub to be built on the site. As a consequence of the proposed demolition of the Senior Citizens building Council relocated the U3A activities in mid 2022 to Digman Reserve and Williamstown Sports Pavilion. An additional benefit is wider contacts have been established with local Sporting Clubs for current and future venue options.
- Positive contact with elected Councillors, in particular Pamela Sutton Legaud
- Excellent working relationship with the Hobsons Bay Grants Officer, resulting in both minor and major grants contributing to our bottom line and funding, IT equipment and the recent Art Exhibition.
- Productive and proactive support from the Hobsons Bay Council Community Support, Community Life team headed by Peter Doull and supported by Barbara Abreu.

Local Member

- Good working relations have been developed with the Local Member for Williamstown, Melissa Horne and her electoral staff

Future Considerations

- Develop broader contact with Hobsons Bay Councillors
- Explore the value of networking and sharing with Victoria University
- Explore opportunities with the Sun Theatre to promote U3A

* 6 people from 5 organisations were interviewed and in addition to the above listed partners a representative from U3A Altona and the network was interviewed.

"I needed to rescue myself after retirement to ensure I had something worthwhile to do – U3A has helped me fill that need"

"At sea after retirement, at a life crossroad, being involved in U3A has helped me turn a corner in my life"

"It is good to know there is enough flexibility that you can combine with family responsibilities"

DATA

- 82% of respondents felt that learning a new skills was important or very important
- 97% of respondents felt that engaging in various activities was important or very important
- 87% of respondents felt that having social contact with others was important or very important – 86% said they had increased their social network
- 86% of respondents feel more positive about themselves
- 75% of respondents feel more intellectually challenged
- 76% of respondents indicated they had learned new skills and knowledge
- 89% of respondents liked the range of activities being offered
- 66% felt that the option of improving their fitness and mobility was important or very important- only 26% of members felt their fitness had improved
- 82% of respondents felt that the annual enrolment process was great

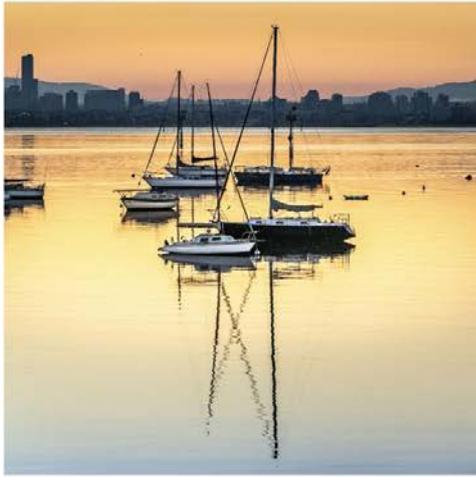
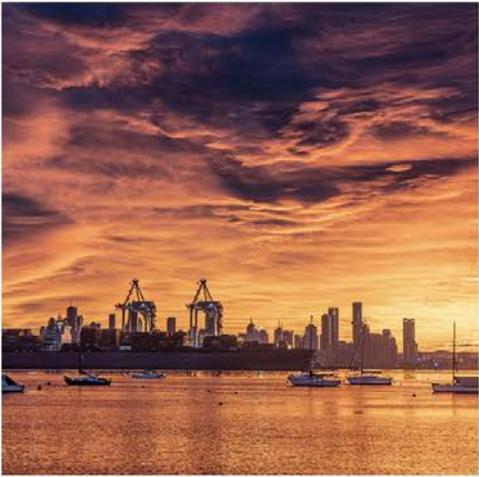
"I tend to be a bit of a recluse and can be too comfortable with my own company which is not always a good thing so my involvement with U3A has been good for my well being"

"Looking to expand the number of activities I will become involved in next year and wanted to thank and reinforce my appreciation for the work the Convenors do"

"People our age want to stay relevant and vibrant – hard post-retirement -U3A has provided me with this opportunity"

"As a new person to the area I have been made to feel welcome – hence the importance of the Welcoming Morning Tea"

"I have had some challenges in my life journeys and often felt alone but being part of U3A activities mean I have new friends and new things to look forward to. I am not alone. My friends say 'I have come alive'"



3.0 Evaluation Methodology

At the commencement of 2022 a working group (Kerry Lewis, Phil Quinn, Sandi Fallshaw, Mikael Wagner and Sandy Guest) was established to conduct an evaluation of the processes and deliverables of the U3A Hobsons Bay/Williamstown. A number of tools were used to collect information and feedback from all key stakeholders. The data collection tools utilised can be viewed as an attachment to this Evaluation Report (see Appendix 1)

- 3.1** Online Survey sent to all members (152 responses from 273 delivered – 56% return rate)
- 3.2** A group SWOT exercise (Strengths, Weaknesses, Opportunities and Threats) was conducted with Convenors at a Convenor workshop (24 of a possible 34 attended 71%)
- 3.3** Committee Questionnaire (7 of 9 completed - 78%)
- 3.4** Personal stories were gathered via personally conducted interviews (participants were randomly selected and 20 members participated)
- 3.5** Interviews with 6 nominated external partners

All the data collected from the above methods was summarised using the SWOT (Strengths, Weaknesses, Opportunities and Threats) format. Learnings from the Evaluation will be used as a key input into future Strategic Planning currently being undertaken by the Committee.

4.0 What are we doing well?

4.1 Wide range of activities that provide:

- Social interaction
- Physical activities
- Learning opportunities
- Short term and long-term activities
- Flexibility – members can participate in as many or as few activities as they choose

4.2 Dedicated Committee

- Strong leadership – leadership demonstrated by the President has been seen as very important and very positive
- Functionality improved – sharing of workload via the establishment of Working Groups and sharing of Secretary role
- Openness to consideration of new activities
- Committee hardworking applying a diverse range of skills and knowledge
- Strong support offered to convenors

4.3 Venues

- Good variety of suitable venues
- Use of venues out of hours
- Local accessibility seen as important
- 76% of respondents were pleased with the management of the U3A facilities in Williamstown

4.4 Communication

- Wide range of communication tools of a very high standard deployed including: regular newsletters, news flashes, and use of social media are highly regarded
- Effective communication with external stakeholders

4.5 External Stakeholders

- Positive recognition from Network about the strong growth of the Hobsons Bay/Williamstown U3A
- Affirmation from stakeholders about our willingness to connect and contribute to the wider community and to cater to the well-being of the community

The effective leadership shown by the President has made a big difference to the organisation

It seems to be a really hardworking Committee

HBWU3A is very proactive and provides a good range of topics to appeal to older adults in the area. I think both HBWU3A and the Council have gained from the relationship

DATA

86% of respondents felt their expectations were met in communication with members

65% of respondents were happy with responses received from questions or issues

The Communications Coordinator is doing a great job

The newsflashes and the newsletters have real flair. The photos are a great ad for the activities as they show people enjoying themselves — motivating to others to get out there and enjoy life — everyone always looks like they are having fun

5.0 What are the weaknesses?

5.1 New Members

- More focus on induction for new members and convenors
- Low male membership
- Accessing isolated residents
- Lack of cultural diversity

5.2 Communication

- Explanation for policies, codes, etc – how and where can they be found

5.3 Lack of venues

- Mobility issues mean some members are unable to attend most events – need for disabilities to be considered
- Facilities at the Cottage are basic

5.5 Activities

- Difficulty getting into courses – many full at enrolment time
- Required fitness level for some activities not always clear
- Lack of convenors for all the possible activities and a challenge to acquire new convenors

5.6 UMAS

- Problems with UMAS website

Getting information out on emails as a convenor is not straightforward. I would like to get people to say they will attend and be able to record who has attended

Some older members have been alienated due to COVID, lack of computer awareness and overwhelmed by the number of activities

If you have some other interest (that's not presently running) you should be leading it

Sometimes I feel there is an overload of information so I skim and read

6.0 Where can we improve?

6.1 Venues

- Link more to local sporting facilities

6.2 Increase Collaboration

- Collaborate more with other relevant organisations, e.g., camera clubs, local sporting organisations, other U3A's
- Learn more about local organisations whose focus is on the aging members of the community
- Utilise our learnings to assist other U3A's to grow and prosper
- Look to influence local planning and policies relevant to ageing

6.3 Diversity

- Investigate how to attract a more diverse cohort of participants – more men and more culturally diverse

6.4 Convenor support and development

- Promote concept of co-convenors for all activities where appropriate
- Ensure new offerings are made in conjunction with availability of convenors
- Seek more input from convenors on what further support is needed

6.5 Committee operations

- Establish more working groups to share the workload
- Focus on consolidation
- Provide the Committee with more information on the role of the Network and type of support available

To attract more men a focus on more practical-task based activities might be needed e.g., Community gardening

I don't have suggestions for improving, but I know I would be listened to if I did

6.6 Suggestions for further activities

A broad range of additional possible activities were suggested during interviews. Some of these activities have been included in the 2023 program. One of the recommendations is to work more closely with other organisations in Hobsons Bay who also offer programs for the over 55's, semi-retired and retired. This could address some of the suggestions for new courses in that they may already be offered by other appropriate organisations.

- A casual coffee club (commencing in 2023), more fun dining
- A discussion group around science and technology, overseas travel groups, Art History, more beginner language courses e.g., French, Mandarin, family history, one off talks by guest speakers including members, public speaking
- Day or weekend trips, Art Gallery visits
- Chess
- Gardening – maybe community gardening, trade activities
- Look for ways to engage with members who are not computer literate. Computer skills – Excel
- Retain the Welcoming Tea — very important to members who do not already have local networks
- Life management – relevant to retirees – e.g., focus on wider principles, e.g., avoiding scams have been popular with other U3A's, access to things like Commonwealth Health Senior's Card (changed criteria), and Financial Management for retirees
- Leadership/governance workshops for new and intending members of the Committee
- Senior tennis, walking football, exercise class-strength training for older people
- Evening book club
- More social days out, home dining groups, let's do lunch groups

Being able to grow in challenging times

These one-off activities that are shared with other U3A's are real winners

A good example of collaborating is the established relationship with Altona U3A

7.0 What are the threats?

7.1 Venues

- Lack of appropriate facilities
- Loss of current venues
- Not enough accommodation options to allow for growth

7.2 Grants/funding

- Insufficient financial resources to support activities
- Less funding (changing grants) available leading to increased fees leading to less members

7.3 Shortage of Convenors

- Aging convenors
- Fewer convenors available/difficulty in engaging new convenors

7.4 Culture/Committee

- Risk of change of culture
- Less switched on Committee

7.5 Membership

- Low membership or inability to attract new members
- Loss of current members due to the inability to enrol in activities of choice that are full
- Growth too rapid
- Loss of members to other U3As and or/other organisations

We can't be everything to everybody — so have a focus on consolidation

I worry that it will get too big and that will restrict my choice of activities

I joined during the year and a lot of the classes were already full

8.0 Summary of Findings

Overall the findings are very positive. The data shows continued growth in members, number of courses and number of convenors. Along with this growth, however, a number of challenges have been identified and these relate to managing growth expectations of members, securing additional and suitable venues and continually engaging additional convenors. It is also important to continually manage the potential increased workload for a fully voluntary committee.

The establishment of Working Groups has been an excellent initiative of the Committee and they are seen as an effective way to attract new participants in sharing the workload and more widely utilizing the skills and talents of the wider membership cohort. It is important to recognise that some of the identified opportunities have been addressed e.g, workshops conducted for Convenors and the Welcome Tea for new members. A number of suggestions have been made for new activities and these will be considered as a key input into future planning. A number of recommendations have been made to address the on-going challenges and opportunities identified by the Evaluation Process.



9.0 Recommendations

- 9.1** Review current process for consideration of new activities including checklist, timelines, sharing of tasks which ensure on-going renewal and sufficient activities available to all members. Consideration needs to be given to the differences required to support on-going activities vs one off activities.
- 9.2** Conduct an annual review of the Welcome Pack that is provided to all new members
- 9.3** Review current process for establishing Working Groups and monitoring their processes and outcomes. These need to be differentiated from Support Groups that work with the Committee’s on-going tasks. Examples identified from evaluation project include:
- Research other groups/organisations in Hobsons Bay whose focus is on the ageing with a view on collaboration for mutual benefit to their members and ours
 - Develop strategies to increase the diversity of the membership
 - Explore opportunities to connect with organisations to develop future activities and promotional opportunities for U3A
- 9.4** Review all activities with a view to securing a Co-convenor where appropriate
- 9.5** Continue to provide support to existing convenors
- 9.6** Consider conducting a workshop for potential new convenors
- 9.7** Review status of all recommendations as part of annual organisational review and annual reporting
- 9.8** Consider adding a “managed increase in membership numbers” as one of the goals
- 9.9** Revise the Mission Statement to include reference to physical activity
- 9.10** Develop a PowerPoint presentation on the key findings of the evaluation project for presentation to External Stakeholders



Appendix 1

1.1 Member Survey

How important is each of the following in your membership of U3A?

	Not Important	Somewhat Important	Neither important or unimportant	Important	Very Important
	1	2	3	4	5
Learning new skills and knowledge					
Engaging in activities of interest to you					
Social Contact with others in U3A activities					
Improving fitness and mobility					
Other Please specify					

To what extent has involvement in U3A across the last year met your expectations in relation to each of the following?

	Hardly	Somewhat	Neither met nor unmet	Mostly	Significantly
	1	2	3	4	5
Learning new skills and knowledge					
Engaging in activities of interest to you					
Social Contact with others in U3A activities					
Improving fitness and mobility					
Other, please specify					

Interaction with U3A

How well has the U3A organisation met your expectations in relation to each of the following?

	Hardly	Somewhat	Neither met nor unmet	Mostly	Significantly
	1	2	3	4	5
Communication with members					
Annual enrolment process					
Response to question or issues raised					
Management of facilities					
Range of activities offered					
Other, please specify					

Outcomes for members

As a result of being involved in U3A activities

	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly Agree
	1	2	3	4	5
My level of physical fitness has improved					
I have increased my social network					
I feel more positive about myself					
I feel more intellectually challenged					
Please describe any other benefits you have gained as a result of being involved in U3A activities					

1.2 Committee Survey

1. Why did you join the Committee?
2. How would you describe your overall experience being a member of the Committee?
3. HBWU3A aims to provide:
 - learning of new skills and knowledge
 - social contact with others in activities
 - improved fitness and mobility

To what extent do you think HBWU3A meets these aims using examples to illustrate your answer?

4. How does your role on the Committee support the aims of the organisation?
5. How does your role on the Committee support the organisation in the dissemination of information
6. What changes would you like to see within HBWU3A in the future and how would these changes help the organisation meet its stated aims?
7. How could the Committee's functions and roles be improved to support the aims of the organisation?

1.3 Stakeholder Interview Questions

1. Let's just clarify briefly the relationship between your organisation and HBWU3A.
2. What was the reason for entering into this relationship?
3. To date what has your organisation gained from this relationship? By the same token, has anything been lost due to the relationship?
4. What aspects of the relationship are working positively?
5. What aspects of the relationship are working negatively?
6. In the future, what improvements could be made to how HBWU3A and your organisation work together?
7. Is there anything you would like to add to assist HBWU3A evaluate itself?

1.4 Success Story Individual Interview Questions

One key activity of the Evaluation Project is to conduct interviews with a random selected group of members. You have been selected as one of these members and I am hoping you are willing to spend up to 30 minutes to share your experiences as a current member of U3A as a key input into the final report. All of your comments will be anonymous. This is an initial email to invite you to participate and I will make contact with you to arrange a suitable time to conduct the interview.

- Question 1: Why did you join U3A Hobson Bay/Williamstown? What attracted you? How did you learn about us? Examples
- Question 2: What type and how many activities have you participated in – over what period of time? How do you choose your activities?
- Question 3: What benefits do you think you have gained from your participation? Examples
- Question 4: Have you participated in any activities that you did not think were worthwhile? Reasons/examples
- Question 5: Would you recommend to others that they join U3A? Why?
- Question 6: Has it been easy to stay connected to U3A? Why or why not?
- Question 7: What is the best part of being a member of the U3A Community? Examples
- Question 8: Do you have any suggestions for future activities? Any suggestions as to how you think the organization could improve?



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