

U3A community inclusiveness toolkit

Resource



This resource was developed for the U3A Network Victoria. It is designed to provide U3A committees and other community organisations with tools they can use to build effective partnerships to meet community need.

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City of Whittlesea Positive Ageing, aged and Disability as a collaborative partner in the delivery of the 'Whittlesea Senior Linkup' network of community connectors. A project in the Strengthening Seniors Inclusion and Participation in Local Communities initiative.

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Introduction

The *U3A community inclusiveness toolkit* is based on the Whittlesea U3A Community Inclusiveness model (refer to Attachment 1) which Whittlesea U3A applied to:

- build relationships
- establish collaborative partnerships
- identify member interests, skills and connections
- solve an accommodation challenge
- source resources to support the delivery of classes and activities that met the needs of a growing membership
- ensure it was an organisation relevant to its members and to the needs of the local community.

The experience gained from the use of the toolkit to build capacity and consequently membership of Whittlesea U3A has been measured as follows:

- growth in membership from 590 to 796 over 18 months
- establish partnering collaborations with eight organisations that provided in kind resource support supplemented with some funding.
- solve a program accommodation problem and upgrade technology to support connecting of members to classes from remote locations.
- set up a resource base to support an anticipated 15% increase in membership over the next three years.
- complete an MOU or collaboration agreements with City of Whittlesea Council and other collaboration organisations that support the validity of the toolkit.

The toolkit is organised around a proven approach to developing within a U3A an inclusive connected culture based on the leadership and members subscribing to the purpose and values of the organisation. All able to communicate the U3As values and standards while being accountable for their programs.

The toolkit presented in this workshop contains the background information, approach to developing practical strategies and worksheets to enable the tools to be effectively used in a local U3A community context. Throughout this toolkit, you will find real examples of initiatives and programs that have been successful in creating more welcoming and inclusive communities.

The toolkit, when applied by leaders of a U3A, has assisted strengthening the U3A through establishing relationships and source resources to provide classes and activities in an environment in which their members can participate and feel a sense of belonging in their local community. It will guide you through creating an inclusive environment within your U3A and establish a respectful position in a broader inclusive local community.

The workshop will provide participants with instruction on the use of the tools in the toolkit to identify:

- skills of members within individual U3As who contribute to building of capacity
- connections of U3As through the membership base to other organisations and community groups that can provide a strategic advantage to an organisation to achieve outcomes that benefit U3A members
- U3A needs by creating conversations within their membership
- sources of accommodation and other resources to support U3As develop capacity to deliver a wider range of relevant classes and activities to engage members and connect to the broader community.

The toolkit includes an evaluation methodology to measure the positive effect on health improvement of U3A general membership over time based on establishing a base current profile. The expected benefits to U3As participating in the workshop and their subsequent use of the tools in the toolkit are the building of relationships that better connect the U3A to the local community, source resources to create an inclusive culture within the U3A to ensure members enjoy their membership of their U3A. The relations established will enable the U3A to advocate for additional accommodation and resources, increase membership and significantly contribute to engagement of seniors in the local community including isolated and lonely seniors.

Importance of community connection and relevance

The experience working with community non-for-profit associations over the past six years has shown that the associations that provide members with relevant classes, activities and programs are well connected to their local broader communities. Their leaders, or committee members, have a willingness to share successes, partner to source resources (including accommodation) and listen to the needs of members.

The association's members and leaders share a clear understanding of the purpose of their association and have a welcoming, experience sharing culture. The application of the community Inclusiveness model is based on the leaders of a community group, such as U3A focusing in on:

- ensuring all leaders and members subscribe to the purpose and values of the association
- identification of an organisation's internal skills and assets
- identification of connections to other organisations and community groups that can provide a strategic advantage to an organisation to achieve outcomes that benefit members
- identification of community group needs by creating conversations within the community group and listening to the community
- adopting a good governance model.

When looking at individual and community assets, it is important to remember that we are looking for opportunities to build relationships and to build connections.

The identification of the membership, or community, needs is most important in setting classes and activities that meet the purposes of a local U3A. A culture of common purpose and values are required to ensure the commitment and engagement of volunteers.

What is the purpose of your U3A?

It is important for the committee members of your U3A to know the purpose of your U3A and that they all give a consistent message to outside organisations and members generally. It is essential for all members of the committee of your U3A to have a copy of the Rules of association of your U3A and know the current purpose and values of your U3A. The membership application form should require an applicant for membership and renewal of membership to confirm they accept the Rules of the association, conditions of membership and will abide by them.

You will find the purpose of your U3A stated clearly in the Rules of Your U3A association.

Exercise

Please complete the following Table for your U3A.

Name of your U3A	
Purpose of your U3A	

Consider describing your U3A's purposes in terms that are relevant to your members and your local community.

U3A network describes its purpose on its website as follows:

The U3A movement is a volunteer organisation providing educational, creative and leisure opportunities in a friendly environment for the retired and semi-retired members of the community.

It also states that it understands the importance of community supporting our ageing population to remain connected and to be healthy.

What is inclusion in a local U3A context?

Inclusion is appreciating and valuing differences of members, semi-retired and retired, seniors in the local community by creating an atmosphere that promotes a sense of belonging where everyone feels respected and valued for their uniqueness. In an inclusive environment, each person is recognised and developed, and their skills are routinely utilised. In an inclusive environment, people are valued because of, not despite, their differences so everyone can fully participate and thrive.

The U3A movement is a unique and exciting organisation which provides, through its U3As, life-enhancing and life-changing opportunities. Retired and semi-retired people come together and learn together, not for qualifications but for its own reward: the sheer joy of discovery!

Members share their skills and life experiences: the learners teach and the teachers learn, and there is no distinction between them.

How well do you know your U3A?

The leadership of your U3A holds their leadership role of a volunteer organisation for the benefit of the members and are the custodian of the values of the U3A and ensure that it is managed to achieve its purposes.

Develop a profile of your U3A which will assist the committee have a clear understanding of the scope of the operations for your U3A today which will define a base line for the measurement of the positive effects of applying the community inclusiveness model.

Complete the following profile table:

U3A profile as at [date]:	
Purpose	
Committee (names and responsibility)	
Membership	
Number of classes / activities	
Volunteer class tutor / leaders	
Location of venues – provider	
Connection with other local organisations	
Relationship with local council	
Positive ageing / senior club support / venues	
Knowledge of local government community plan – positive ageing strategy plan	

Group the current classes / activities into the groups in the following table:

Exercise your mind and develop skills	Pursue arts, hobbies and interests	Exercise your body	Socialise
<i>Example</i>			
<i>Technology – computer, laptop, tablet and smart phones</i>	<i>Art</i>	<i>Dance – line dance</i>	<i>Games – mah jong, scrabble, snooker, chess, cards,</i>

A workshop outline 'Know Your U3A' is attached as Attachment 2.

What components does a U3A require to operate effectively?

To achieve providing members with positive experiences each individual U3A must focus on identifying the strengths and assets of the membership. Skills of members within individual U3As to contribute to building of capacity. To provide an environment to achieve these outcomes for members each individual U3A must have the following:

- Members
 - semi-retired, retired seniors of the third age (over 50)
- Accommodation
 - adequate accommodation in the form of class room facilities areas suitable for physical activities, meeting rooms and social facilities with food preparation areas
- Tutors
 - tutors and leaders knowledgeable in topics of interest and have the skills and experience to share their knowledge with class members.
- Resources
 - access to resources that support tutors and leaders deliver classes and activities
- Community connection
 - connection to the local community to adopt collaborative partnering arrangements for the benefit of members

What is the U3A community inclusiveness model?

The Whittlesea Community Inclusiveness Model is an apolitical community benefit approach model designed to:

- identify the interests of members
- source resources to support sustainable classes
- create a connected inclusive membership community

The model framework places an emphasis on a 'seek and develop' approach to develop classes and activities that engage seniors and meet their individual educational and social needs. It represents an approach that can contribute to the successful facilitation of the implementation of solutions to matters identified in the report by the Commissioner for Seniors Victorians: *'Ageing is everyone's business'*

The model focuses on developing respectful relationships between the local U3A and the following:

- councillors and, through the councillors, the mayor. Councillors are elected on a four year election cycle and the mayor in most municipalities elected annually by councillors
- local members of parliament – federal and state and establish relationships across all parties. You never know who the next party in government will be
- managers of library networks and community connection managers
- managers of neighbourhood houses
- community activity centres
- other service providers to seniors in the local community.

The model framework fits within the City of Whittlesea's *Our positive ageing strategy* to capture research and local experience of ageing using it to lead and build a response to seniors ageing well and assist them to live fulfilled lives regardless of age, health or life stage. It is also consistent with the initiatives being implemented by government to support inclusion of members of refugee communities, building of leadership capacity and community resilience programs.

Approach to identifying community assets and needs

An approach to identifying community assets and community needs are central to a community development model called 'Asset-based community-driven development' (ABCD). Many organisations have applied the principles of the model and have developed resources to share with other organisations to assist in the identification of community assets and needs.

Principles of the model

Principle	Does your U3A meet these principles
Do your members have fun?	
Do you take classes / activities to close proximity of your members?	
Measure satisfaction of members	
Don't ignore your member assets (Gifts of the Head, heart and hands)	
Lead by listening to members	
Do you celebrate success and recognise member achievements?	
Do you share member stories with the wider membership and broader community?	

- Focus on member assets and strengths rather than problems and needs
- Identify and mobilise member and community assets, skills and passions
- Member driven – 'building communities from the inside out' (Kretzmann and McKnight 1993)
- Establish partner relationships

A range of these resources which include games, ideas, training materials that can be used locally by organisation to identify community assets and needs. See the [ABCD project website](http://abcdproject.org.uk/index.php/toolkit/) <http://abcdproject.org.uk/index.php/toolkit/> for more information.

- We look at what institutions, such as non-government organisations, not for profits, government agencies, and businesses, are already connected to the U3A and or its members. Pay attention to small, local institutions.
- We look at our physical environment, both natural and built, in a new way.
- We consider the local economy in a broad way so that we include the informal economy, such as people swapping goods and services, voluntary work, as well as the traditional economy, for example, production, consumption.
- Appreciate the community stories, culture and heritage.

When looking at individual and community assets, it is important to remember that we are looking for opportunities to build relationships and to build connections. We are not creating a directory. The value in asset mapping is bringing people together so they discover each other's strengths and resources, and to think about how they can build on what is already in the community. One way we can do this is by fostering the relationships, or the place, where assets can be productive and powerful together.

Relationships and social networks that exist within your U3A membership are assets in their own right, but building relationships between assets within the membership and with broader community organisations is fundamental to asset mapping.

Sample U3A community needs survey

U3A current and future needs

How would you like to see your U3A change in the next five years?	
Are there needs or gaps in our classes and activities that are not being met?	
Does lack of accommodation limit the number of classes / activities your U3A can offer?	
Are there any changes taking place in your U3A that concern you? What are they? What might be done about those changes?	
Are your Tutor / Leaders maintaining class numbers?	
Are members requesting classes / activities but there is no Tutor / Leader available?	
Do you require more resources to support Tutor / Leaders	
What programs do you know of that people are trying in other places that we should try in your U3A?	
Have you identified any organisations that could be strategic collaborative partners?	
Do you have members with strong connections with broader community organisations?	
<p>Whom do you serve?</p> <p>It may help you as a starting point to write up a detailed description of how you see your community. Your headings could include:</p> <ul style="list-style-type: none"> • The geographic boundaries of your local community • The length of time your U3A has been in existence • The general history of the local community, the way priorities have changed over time • The key people and leaders in the local community • Demographics: ethnic makeup, male/female ratio, age, economic standing, education levels • Issues of most concern to the local community 	

- | | |
|---|--|
| <ul style="list-style-type: none"> Local community morale and involvement levels | |
|---|--|

After the information gathering is completed a report can be circulated.

A community assets register can be used for purposes as diverse as:

- member recruitment
- strategic planning
- fundraising
- government compliance
- building partnerships
- media briefings
- proposal writing.

Identifying collaborative partners

Selection of collaboration partners

Consideration should be given to the establishment of long-term collaborative partnership to establish a long-term platform to ensure that WU3A remains relevant into the long term and its courses and activities are sustainable to service its members and the senior cohort in the municipality into the long term. The Inclusiveness Model is focused on identifying the needs of current U3A members and seniors in the broader community who wish to connect with others to share experiences; build skills and connections; and enjoy areas of interest thus maintaining a healthy life.

<p>Member Consultation: Encourage members to engage in conversations over coffee. The Coffee and Chat concept uses informal discussion to identify member interest new classes and activities.</p>	<p>The application of the model requires the identification of the interests of members to enable the resources required to successfully create an inclusive environment to be determined. Trial new initiatives through pilot programs to confirm the scope of the proposed new program. The findings from the experience gained from the pilots is necessary to identify the scope of a collaborative arrangement.</p>
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Collaborative partnerships are most effective when a member of the U3A Committee of Management is given the responsibility as 'Coordinator of Collaborative Partnerships'. The forming of collaborative partnerships has been successful in sources resources in particular venues to support the delivery of U3A classes and activities and new programs such as the Whittlesea U3A (WU3A) Walking Football activity. The Walking Football Program is on the Whittlesea U3A Course List but is delivered by a collaborative partnership formed between Whittlesea U3A, City of Whittlesea Positive Ageing Team and Melbourne City Football Club.

The approach has been significant in the successful development of U3A classes and activities that have contributed to WU3A remaining relevant to its changing local demographic and membership base.

Answers to the questions in the table below will assist in identify potential collaborative partners:

Your U3A community connection

What does your U3A mean to its local community?	
How can your U3A connect with community members to engage them in classes / activities of interest?	

Why does your U3A do what it does?	
Which organisations does your U3A have close connection with?	
How can your U3A contribute to assisting other organisations achieve their objectives and in doing so provide benefit its members?	

The committee realised that WU3A had established close connection over time with the local council, significant community support agencies and local members of parliament. These relationships were the key to identifying potential collaborative partners. As a result, WU3A realigned its forward strategy plan to be based on a premise that WU3A should take a collaborative partnering position not adopt an attitude of competition. WU3A is now about **collaborating to source resources to support the delivery of relevant sustainable classes and programs.**

The management committee committed to the framework of the WU3A Community Inclusiveness Model based on establishing collaborative partnerships and nominating members of the management committee to leadership roles in the positive ageing initiatives in the City of Whittlesea.

A framework of a collaborative partnering memo of understanding (MOU) is attached as Attachment 3.

Attachment 1: What is a community inclusiveness model?

Whittlesea community inclusiveness model

The Whittlesea community inclusiveness model is an apolitical community benefit approach model designed to:

- identify the interests of members
- source resources to support sustainable classes
- create a connected inclusive membership community.

The model framework places an emphasis on a seek and develop approach to develop classes and activities that engage seniors and meet their individual educational and social needs. It represents an approach that can contribute to the successful facilitation of the implementation of solutions to matters identified in the report by the Commissioner for Seniors Victorians: *Ageing is everyone's business*.

The model focuses on developing respectful relationships between the local U3A and the following:

- Councillors and through the councillors the Mayor. Councillors are elected on a four year election cycle and the Mayor in most municipalities is elected annually by the Councillors
- Local members of parliament – federal and state and establish relationships across all parties. You never know who the next party in government will be
- Managers of Library Networks and community connection managers
- Managers of Neighbourhood Houses
- community activity centres
- advocacy organisations such as COTA
- other service providers to seniors.

The model framework fits within the City of Whittlesea's 'Our Positive Ageing Strategy' to capture research and local experience of ageing using it to lead and build a response to seniors ageing well and assist them to live fulfilled lives regardless of age, health or life stage. It is also consistent with the initiatives being implemented by government to support inclusion of members of refugee communities, building of leadership capacity and community resilience programs.

The Whittlesea Community Inclusiveness Model has been successfully applied to develop successful collaborations to source resources to support the delivery of sustainable classes and activities. The highest profile applications are:

- City of Whittlesea, Peter Lalor Vocational Secondary College and WU3A - Development of a Senior Resource Hub
- City of Whittlesea Positive Aging Unit, Melbourne City Football Club, Mill Park Basket Ball Stadium and Whittlesea U3A - Created a weekly Walking Football Program on the WU3A class schedule.
- Whittlesea U3A RMIT University Confucius Institute - Chinese Medicine and Well Being
- Yarra Plenty Regional Library, Whittlesea Library, - Mr Whittles Proactive Robot to connect isolated seniors
- Membership of the City of Whittlesea SSIP project leadership group and lead the development of the [Whittlesea Senior Link Up web based application](https://www.seniorsonline.vic.gov.au/get-involved/grants/ssip/whittlesea): <<https://www.seniorsonline.vic.gov.au/get-involved/grants/ssip/whittlesea>>.

WU3A recognised the benefits of sharing of the outcomes of projects undertaken by individual U3As in particular the knowledge of how the outcomes were achieved supported by a guide to an approach to apply the learnings to U3As in their immediate locations. The sharing of the educational responses to individual and social needs of senior Victorians is important to individual member U3As remaining relevant to their members.

Attachment 2: How well do you know your U3A Members?

The leadership of your U3A holds their leadership role of a volunteer organisation for the benefit of the members and are the custodian of the values of the U3A and ensure that it is managed to achieve its purposes.

Our U3A: Where to next?

Program

9.15am: General introduction

9.30am: Discussion groups

Reflecting

- Where have we come from?
- What have we achieved?

Reviewing

- What have we enjoyed and appreciated about Our U3A?
- What didn't hit the mark?

10.30am: Recording the wisdom

10.45am: Morning tea

11.15am: Discussion group

Renewing

Where to from here?

- How will we do it?
- With whom?

12.15pm: **It's a Wrap!** Finishing up

12.30pm: Please join us for **lunch** at **Epping RSL**

Sample Workshop Facilitator introduction and program outline

Hi all,

Welcome, and thank you for joining us for the U3A workshop.

I'm looking forward to getting to know you as we workshop together this morning.

Here's a little about myself. Now retired, I was a clinical psychologist in private practice for many years. I have always found that the people I work with are far wiser and much more creative than me. So I really enjoy facilitating workshops that tap into the knowledge of the participants, and that encourage everyone to create and contribute.

Today I am really looking forward to learning about the history of Whittlesea U3A, what people value from their involvement, and how they want to move forward into the future. We've deliberately developed today's program so that everyone has the opportunity to contribute and hear what others have to say.

Here's a few of questions to get you thinking.

- What needs to happen at the workshop today for you to know that it has been worthwhile attending?
- What would you like to say that you think is important for others to hear?
- What have you appreciated about Whittlesea U3A, and what ideas do you have about it moving into the future?
- What would you like to come out of this workshop for you and your WU3A?

Overall, many thanks for being here, and do enjoy the morning. We really appreciate your contribution.

Attachment 3: Example memorandum of understanding (MOU)

[Delete instructions in red]

Memorandum of understanding

Between

[Name] Council

(Positive Ageing Team)

and

U3A [Name]

for the delivery of a project / share facilities at location.

Date:

Objective of the MOU

The purpose of this agreement is to describe the partnership and financial arrangements between [council name], Positive Ageing Team and U3A (U3A [name]) relating to the delivery of [program name] program at [program address]

Duration

The duration of this agreement will be for the [year] year term commencing 1 January [year] in accordance with the license to occupy that U3A [name] has in place with the [name] School Council. An option to further extend the agreement will be reviewed at the expiry of the initial term subject to a further license extension between U3A [name] and the [name] School Council.

Background

U3A [name] has entered into a License Agreement with the [name] PLVC to occupy administration offices, kitchen and class rooms at [address] to manage the delivery of U3A [name] classes, activities and programs in the Municipality of [name].

Council Positive Ageing Team has assisted U3A [name] complete arrangements with the School Council to occupy the [name] facility for the purposes of delivering U3A [name] classes, activities and programs.

U3A [name] and [name] Positive Ageing have established a collaborative approach which sees the parties working together to provide seniors in the municipality of [name] with activities and support in accordance with the City [name] Positive Ageing Strategy. The U3A [name] and [name] Positive Ageing recent collaborations include:

- physical and social activities
- leadership of the Strengthening Seniors Inclusion projects
- A
- B

Partnership commitments

The parties enter into this agreement in the spirit of partnership and cooperation and commit to open and honest discussions.

The parties agree to honour their obligations under this agreement and to:

- manage the partnership and relevant projects arising therefrom in such a way
- that the overall objectives of the partnership and commitments can be achieved.

The parties agree to champion the partnership within and outside the respective organisations and network connections as appropriate.

The parties agree to make timely decisions and take action in order to avoid unreasonable delays in commitments and projects arising from this agreement.

The parties agree to support each other with mutually agreed applications and submissions that will enhance the collaboration.

Governance arrangements

The U3A [name] President and Partnership Coordinator Manager, the Manager [name] and the Team Leader Positive Ageing, will meet a minimum of two (2) times throughout the year for the duration of this MOU to review this collaborative arrangement.

- The chair for these meetings will alternate.
- Decisions will be made by consensus

- Meeting agendas and minutes will be provided in respect of each meeting and circulated to all participants in the meeting. The parties will share responsibility for preparation of these items.

Additional meetings may be held throughout the year as deemed necessary by the parties regarding general [name], program development and other relevant matters. Such meetings will be agreed between the U3A [name] President and the Team Leader Positive Ageing and may include other staff as deemed appropriate.

Scope of the Agreement

U3A [name] has, with assistance from [name] Positive Ageing Team, established the [name] within the Licensed facility (Attachment 1) and agrees to provide [name] Positive Ageing Team at no cost and on a booking basis with:

- access to the facility to assist in their support of Seniors Clubs registered with [name] The Positive Ageing Team
- use of activity rooms for the [name] Positive Ageing team to present information of relevance to seniors
- assistance in supporting the sustainability of the Community Connector program
- use of a work station
- WiFi internet connectivity to support the delivery of programs from U3A [name] training and meeting rooms
- assistance with photocopying of guide notes for training programs – agreed on a program by program basis.

All other costs to deliver [name] Positive Ageing Team programs from the facility and other areas will be the responsibility of [name] Positive Ageing Team.

U3A [name] agrees to promote [name] Positive Ageing Team activities to U3A [name] members.

The parties agree to collaborate on initiatives and projects for the benefit of seniors with in the municipality of [name] as opportunities arise.

The parties acknowledge that the agreement does not limit the parties to development of other opportunities outside the scope of this agreement or prevent the parties from entering into agreements or building relationships with other entities and areas of Council.

Review and evaluation

U3A [name] and the [name] Positive Ageing Team agree to jointly determine a method of evaluating the partnership including documenting the effectiveness of agreed programs and preparing relevant evaluation reports.

Publication and acknowledgements

The parties will notify and provide to each other copies of any press releases, publications, advertisements or other announcements relating to this collaboration, the use of the facility and projects arising therefrom.

The parties will acknowledge the other in any press releases, publications advertisements or other announcements relating to this collaboration, the facility and projects arising therefrom.

The parties agree to share information which has relevance to or potential impact for this collaboration, the facility and projects arising therefrom.

Dispute Resolution

The parties agree to notify each other of any problems or issues as they arise and to consult in good faith to determine any unresolved disputes in order to achieve the objectives of this agreement.

The parties agree to meet within a reasonable time of a dispute arising with a view to resolving it.

If the dispute cannot be resolved to the satisfaction of the parties and within a reasonable time, the parties may appoint an independent mediator to assist the parties to resolve the dispute.

Financial arrangements

As a component of this agreement, the [name] Positive ageing Team will, upon the production of the appropriate invoice, make payment of \$xx,xxx.xx (including GST) to U3A [name] being a one-off contribution to assist with the fit-out of the facility.

The parties agree to support each other in making application for additional resources to operate the facility, and relevant projects arising from this partnership.

Privacy and confidentiality

Each party agrees that any information and data generated during this collaboration will be handled with the highest level of regard for issues of confidentiality and will remain the property of the respective parties. Parties will not use or disclose such information other than for the purposes of this agreement.

Indemnity

Each party agrees to indemnify and hold harmless the other party and its employees / volunteers from any claims, liabilities, losses, damages, and expenses asserted against the other party and arising out of the indemnifying party's negligent act or omission under this Agreement.

Authorisation

Each party agrees that they have read the terms and conditions of this MOU and in signing agree to be bound by terms and conditions contained therein. The signing of this document is not a legal undertaking. It implies that the signatories will strive to reach the objectives set out herein to the best of the individual organisations ability to deliver the projects and programs identified.

Notices

The address for notices to the [name] is:

[name], Manager Aged and Disability

Phone:

Mobile:

Email:

Web:

Postal address:

Street address:

The address for notices to U3A [name] is:

President U3A [name]

Phone:

Mobile:

Email:

Web:

Postal address:

Street address:

Signed for and on behalf of the [name] Municipality

Name:

Position:

Signature:

Date:

Signed for and on behalf of U3A [name]

Name:

Position:

Signature:

Date:

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