

Huddersfield and District U3a

Affiliation to the National U3A and Adoption of the Beacon System

Report of the Working Group

1 Introduction

A proposal was made at the AGM in 2024 for the Huddersfield U3a ("HU3a") to adopt the National U3a Beacon administration system necessitating affiliation to the National U3a.

This proposal was debated by the full committee in December 2024 and it was decided to set up a sub-committee to examine this proposal.

The purpose of this document is to set out the results of those deliberations, the advantages and disadvantages of adopting the system and affiliating with the National U3a and the sub-committee's conclusion.

2 Executive Summary

The working group has concluded that

- the present membership system, based upon an Access database, will need to be replaced within the next few years;
- the National U3a Beacon system would be a satisfactory replacement;
- there are no cheaper commercial systems available for holding membership records which meet our needs;
- although this necessitates affiliation to the National U3A this is worthwhile as it provides access to the use of the Beacon system and some small benefits to members and trustees;
- Affiliation to the National U3A will not affect the independence of HU3A, and its constitution and rules will continue to be set by HU3A.
- the adoption of the Beacon system will enable migration to a predominantly electronic system of enrolment and communication;
- changes will need to be made to the current methods of communication with members so that the costs of affiliation can be covered by efficiencies and savings elsewhere in the administrative system
- it will be necessary to run a postal and paper-based system for those who either request it or do not have email addresses.

- Overall there is estimated to be cost to HU3a of under £1,000 if the poll is extrapolated or a small saving if all members with email addresses use the system . Detailed costs and savings are set out in section 6.

The reason and considerations of the working group in arriving at these recommendations are set out in more detail in the following sections.

3 Recommendations

- The following are the recommendations of the working group:-The Beacon system is adopted for the administration of the HU3a.
- The HU3a affiliates to the National U3a to gain access to the Beacon system and other benefits.
- Changes are made to the current methods of communication with members so that the costs of affiliation can be covered by efficiencies and savings elsewhere in the administrative system.

4 Computer and Administrative Systems

4.1 Current position

The HU3a currently uses an Access database to hold membership and course records. At some stage this will need to be replaced.

Members communicate with HU3a by a variety of means including through the web site, email, letters and telephone. However, the key communication is through printed prospectuses and newsletters. The benefits of the Beacon system will only be realised if the bulk of our communication takes place in electronic form.

4.2 The Beacon system provides:-

- A comprehensive set of tools for handling membership: new members, renewals, subscriptions, address changes and communications.
- It is internet enabled and members can look at the programme, see whether there are on vacancies on the courses, book themselves onto courses, check their details are up to date. It will also allow members to pay for their courses using a debit or credit card.
- Leaders can access directly details of their courses and who is attending.
- There is an integrated accounting system. The accounting system that is part of Beacon and can be used or not but it would get away from using spreadsheets to a system with built in integrity.

The financial management system is based on a secure, simple transaction approach. Every transaction can be assigned to individuals, groups and categories, and the system provides tools for reconciliation with bank accounts and regular reporting, including Gift Aid declarations and claims.

- Securely encrypted with three copies, one operational and two backups.
- Technical support – This is included as part of the cost together with comprehensive training packages.
- A website if included and hosted for no cost and the new look U3a sites look more than adequate to use in the future rather than incur the cost of another redesign of a dedicated website for HU3a.
- An integrated email system allowing communication with members easily and efficiently.

Members of the working group and other committee members saw a comprehensive demonstration of the Beacon system. This showed that the system will meet the requirements of the HU3a administration and accounting records with some changes to methods of working.

It is a comprehensive computer system developed by the National U3a Organisation to assist U3a organisations in managing the administration and finances of their organisations. Beacon is available to all affiliated U3a's in the UK that wish to take advantage of it and over 600 individual U3a's utilise it to provide them with a secure, efficient and effective means of managing their day-to-day business functions.

4.3 Advantages of Beacon

- There is no need to install separate software. All interaction with Beacon takes place through the web browser of your phone, tablet or computer.
- Technical support – This is included as part of the cost together with comprehensive training packages.
- Once the system is bedded in it should ease the workload as members will be able to answer their own questions, renew their membership and book themselves onto courses using a computer, tablet or smart phone.
- Members can pay using a debit or credit card as well as bank transfer, cash or cheque.
- All HU3a data is together, secure and held in just one place.
- It would allow HU3a administration volunteers to undertake their tasks at a time convenient to themselves rather than fixed times. Roles and tasks would be clearly defined so this method of working could be achieved.

4.4 Disadvantages of Beacon

- There will a major change to current working for the HU3a administration volunteers. There will be a need to adapt processes and work differently. This, however, only a single disruption and not a continuous disadvantage.
- Members will need to adapt to the new system but the members' experience is like access to any new internet site with menus and instruction. This may result in more contact from members initially but the fact that many U3a organisations

use the system successfully must mean that most members can successfully manage.

- Although the majority of members will be able to access and use the new system there will be some who cannot but they will continue to operate as currently through the post or phone calls.

5 Affiliation

The adoption of the Beacon system requires the HU3a to affiliate to the National U3a. Discussions with representatives have confirmed that the constitution and rules will remain the same if affiliation goes ahead,

5.1 National U3a Benefits

The HU3a could also benefit from affiliation in the following ways:

- Management courses for trustees, treasurers etc.
- Keeping trustees up to date with legislation and taxation
- Grants for equipment
- Included Insurance for all U3a activities and indemnity insurance for trustees

5.2 Affiliation Benefits to Members

There are benefits to our members as well. Other local U3a's are affiliated to the National U3a and because of this members could receive a discount to their membership of both organisations, because you only have to pay the affiliation fee once*. Some HU3a members are also members, for instance, of the Holme Valley U3a and currently do not get a discount on their HU3A membership fee. If we affiliated then that proportion of the membership fee could be deducted.

[Note: Not all U3As do this - e.g. Dronfield & District: "No reduction is given..... to members of other u3as" vs (e.g.) Battle & District: "For a Single Member without "Third Age Matters" £12, ...For a person who is a member of another U3A £8:00". Others do not mention the issue at all.]

Members can also attend summer schools which include about 10 talks or events and meet people from all over the country.

On balance the group concedes that the benefits to HU3A members of affiliation are limited and would not warrant the costs entailed were it not for the benefits that access to the Beacon system would bring.

6 Costs and Savings

There are significant costs associated with adoption of the system by HU3a but there are opportunities for savings as well to offset those costs. The results of the recent poll have been used to estimate saving from the newsletters.

The proportion of savings is calculated as follows:

		Replies to Poll	% of total	Agreed to use website	% accepting website information	Applying those %'s to the total
Email addresses	949	371	39.1%	326	87.9%	834
No email address	77	36	46.8%	1	2.8%	2
	1,026	407		327		836

Estimated % who would accept Internet use with email reminder 81.5%

It is recognised that the low response to the poll makes these savings difficult to estimate but it does strongly suggest that the membership is relatively apathetic in relation to this issue and the majority would be willing to accept electronic communication and use web access to membership details and course enrolment. There will be some members who would still require paper and postal communications.

The cost savings are set out below:

Costs						
Based on	1,026	members			£	
Affiliation to the National U3a			£4.50	4,617		
Use of the Beacon System			£1.00	1,026		
Total Costs				£5,643		
Estimated Savings						
			Reduction based on		Reduction if all email	
		Total	poll		members used	
		Cost	81.5%		Beacon	
					92.5%	
		£	£		£	
Spring newsletter						
Printing		463	377		428	
Postage		640	522	899	732	1,161
Prospectus						
Printing		950	774		879	
Postage		640	522	1,296	1,056	1,934
Autumn newsletter						
Printing		421	343		389	
Postage		640	522	865	704	1,094
Insurance				460		460
Membership cards		Card 50p + Postage 80p		1,334		1,334
Total Savings				£4,853		£5,983
Net Estimated Savings/(Cost)				-£790		£340

It is estimated there will be a net cost to the HU3a through the adoption of Beacon and affiliation to the national U3a as shown above, but this could be offset by the savings proposed above.

These calculated cost_savings will increase over time as the membership changes and becomes more accepting of the use of IT systems and the internet to engage with organisation. The calculations do not include savings arising from the IT systems support costs, the HU3a website etc., but there could be savings in these areas eventually, with a full migration to the Beacon system and using a HU3a website within the National U3a website.