



# Notice to Beacon Users

In July, Pam Jones, then Chairman of the Trust, updated Beacon Users on recent developments with the Beacon membership system. This included consideration of the following points:-

- that Beacon management costs have significantly exceeded income this year, due to the costs of the specialist software company in addressing bugs and enhancements, GDPR and security considerations and the employment of a staff member to alleviate the unacceptable workload on the lead volunteers, who had given notice of their impending 'retirement'.
- that the Trust's Board of Directors are legally prohibited from offering charged services to members at an accumulating loss; this requirement is particularly relevant as only a minority of U3As are Beacon users.
- that the Trust were appointing an external consultant to advise on "Beacon - the Way Forward".

The report was received in the autumn and included the following points:-

- that Beacon is a valued service to members. It is easy to use and minimises the volunteer support needed to manage a U3A.
- that it is a system that cannot be enhanced, without significant cost, to provide functions that U3As will increasingly request. Accordingly, the Trust should plan, sooner rather than later, to replace Beacon with "Beacon 2".
- that lower cost commercial membership systems can be customised for the specific requirements of both individual U3As and the Trust whilst, at the same time, offering additional functionality and higher levels of security.

The Board considered in great depth the future of Beacon in order to ensure that U3As continue to have a sustainable and resilient service that meets their needs, as well as a financial model that is both viable and fair to all members.

Against this background, at its December meeting, the Board took the following decisions:-

- that Beacon provides a membership system to U3As that is valued.
- that, for technical reasons, Beacon cannot be enhanced and upgraded to meet the future needs of U3As, without significant cost for a system with a limited life.
- that Beacon should be replaced by a commercially sourced "Beacon 2" that provides users with a modern membership system that is both cost effective and provides additional functionality.
- that "Beacon 2" would be structured so that the existing, and successful, user support volunteer arrangements continue.
- that a "Beacon 2 Working Group", made up of existing Beacon Team and Trust members, will be formed in January 2019 to advise the Trust on the implementation of the new system.

- that the transferring of data from Beacon to “Beacon 2” should be seamless and commence on 1 April 2020 and be completed by 31 October 2020, or earlier if possible.
- that the current Volunteer and Trust support for Beacon continues during this transition period and that U3As currently not using Beacon are encouraged to do so.
- that the current Beacon fee (50p per member per year, 42p net of VAT) be increased to £1 (83p net) from 1 April 2019.
- that the Trust will regularly keep Beacon users up to date with developments with “Beacon 2” and hold meetings to ensure a smooth transition to the new membership system.

The Trust is confident that the above recommendations will upgrade Beacon with minimal disruption to users whilst, at the same time, putting the service on a sustainable financial basis and provide enhancements that U3As require to manage their U3As.

Comments, or further queries, on points raised in this notice should be sent to [beacon@u3a.org.uk](mailto:beacon@u3a.org.uk)

17 December 2018

Ian McCannah  
Chairman  
Third Age Trust

Sam Mauger  
Chief Executive  
Third Age Trust