



SiteWorks: Final Report

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August 20, 2025

DRAFT: V.0.2a

Todo list

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Executive Summary

This report discusses the results of a number of surveys that were conducted during and after the delivery of *SiteWorks* to individual u3as. To support parts of the discussion the minutes of both the Change Board and Teams Leader meetings and email exchanges are also referenced. The key observations and lessons identified are as follows:

OBSERVATION

Feedback from Website Administrators: The feedback from all the surveys gave a very high user satisfaction rating (>85% indication agree or strongly agree) across all metrics. With 78% of Website Administrators indicating that *SiteWork* is currently fully satisfying the requirements of their u3a. A number of minor issues regarding usability and support were noted, but these can be rectified.

Feedback from *SiteWorks* Team: The majority of team members were very positive in becoming involved in this volunteer led project, and were highly satisfied with the end result. However there was a general feeling the TAT was not fully supportive, with lack of promised training, poor communication and apparent lack of interest and trust.

Meeting the needs of the user community: With projects delivering to a volunteer led organisation, it was clear the ability of users varied considerably, hence documentation and the engagement processes must fully reflect this variation.

LESSONS LEARNT

Project Leadership: The feedback from Team Leaders points to a weakness in project management, particularly the links between the *SiteWorks* team and TAT. In future projects of this type, a management and reporting structure needs to be instigated from the project's onset.

Project Plan: A clear set of project deliverables and benchmarks needs to be identified with all parties (i.e. TAT, TATTL, the project team and the user community) prior to project commencement.

Data Capture: In any future project of this type, a unified process collecting and collating project metrics, including effective document control, should be instituted by the project manager.

Lack of Project Resources: Projects of this size and nature need to be correctly supported (and/or resourced) with the required training, administrative support (bulk emailing and help with other tasks e.g. minutes etc.), together with the IT infrastructure (e.g. maintaining the project management software) from the project's onset.

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Acknowledgements

The author acknowledges the contribution of the SiteWorks Team and the individual u3a Website Administrators in compiling this report.

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Terminology

Beacon	A TAT provided web-based tool that allows u3a sites to manage their membership, events, newsletters and more.
CMS	Content Management System.
FOSS	Free Open Source Software.
GDPR	General Data protection Regulations.
I&E	Invite and Engagement Team.
Project Team	Generic term used in the report for the SiteWork Teams Leaders and migrators. Team Members (e.g. developers, communication) and migrators.
<i>LocalWP</i>	The <i>Local</i> software package that allows offline development of a <i>WordPress</i> site, see https://localwp.com/
OpenProject	Open Source Project Management Software used by the <i>SiteWorks</i> project, see https://www.openproject.org/
OSS	Open Source Software
TAT	Third Age Trust
TATTL	Third Age Trust Trading Limited
T&C	Terms and Conditions for <i>SiteWorks</i>
Website Administrators	Generic term used in the report for Web Managers, Assistant Web Managers and other u3a members who were involved in the migration and ongoing maintenance of a local u3a's website
WMUG	Web Managers User Group

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Chapter 1

Introduction

1.1 Project Overview

Founded in 1982, the UK u3a movement (based loosely on the French model) aims to encourage groups of people no longer in full-time work to come together and continue their enjoyment of learning subjects of interest (u3a 2025, *get-involved/join*). From the inception, the guiding principles were to promote non-formal learning through self-help interest groups covering a wide range of topics and activities as chosen by their members. There is no minimum age (u3a 2025), but a focus on people who are no longer in full-time employment or raising a family, i.e in their *third age*. The founders envisaged a collaborative approach with peers learning from each other. The u3a movement was to be self-funded, with members not working towards qualifications but learning purely for pleasure. There would be no distinction between the learners and teachers – everyone could take a turn at being both if they wished.

In early 2025 the u3a was ranked 17th in the list of top UK membership bodies with 405,000 members (Gott 2024). However it should be made clear that each local u3a is a totally independent charity with individual constitution, policies and working methods. The u3a national organisation – the Third Age Trust (TAT) - provides educational and administrative support to all local u3as, including software tools to manage and support their activities. These includes *Beacon* for membership management and were prior to 2024/5 *Site Builder* to give a web presence. In addition the Third Age Trading Limited (TATTL) is the Third Age Trust's wholly owned trading subsidiary. Its activities are aligned to the charitable objectives of the Trust, it helps to support the Trust and contributes to the u3a movement (u3a 2025, *Third Age Trust Trading Limited*).

It was recognised around 2022¹ that local u3as across the UK had a requirement for an easy-to-use website creation and management system to replace *Site Builder* that was moving towards obsolescence and issues with long term support. This led to the development of *SiteWorks*, based on the widely used *WordPress* CMS² configured by a number of u3a specific plugins. *WordPress* is an Open Source Software package distributed under the GPLv3³ Licence (WordPress 2024). One point to note is that any plugin developed for *SiteWorks* automatically takes this licence by default and hence the plugins can be used by any website without the purchase of the full *SiteWorks* package as detailed in Section 2.

For convenience, the *SiteWorks* project was divided into two:

1. **Development and Migration**, where the u3a specific plugins were specified, developed and extensively tested. This was followed by the migration of over 670 individual u3as from *Site Builder*. The migration required the training and provision of support to the Website Administrators giving them the skills to migrate, design and maintain their new site.
2. **Business as Usual (BAU)**, the project transitioned to this phase in December 2024, on the completion of the migration aspects of the project. This phase of the project is to maintain and enhance *SiteWorks* in a controlled manner and support the u3as in the long term. It is expected that this phase may lead to further development that will link various *Beacon* and *SiteWorks* features at a later date.

¹>09 Meetings>Technical meeting> Minutes of 1st WPU technical meeting.docx

²CMS software allow creation, management and delivery of digital content.

³The *GNU Public Licence* is detailed at <https://www.gnu.org/licenses/gpl-3.0.html>

1.2 Report Objectives

As the project moved to the end of its first phase it was recognised that no formal knowledge retention policy was in place, though various parts of the project did capture information, this led to a number of “knowledge silos”. This document brings together a number of information sources and surveys, including:

1. Migration data collected by the Project Team between January and December 2024.
2. Results from questionnaires completed by Website Administrators as part of the training process, this include the results of draft post training questionnaire circulated in October 2023.
3. A survey of the members of the Project Team conducted in February 2025.
4. A survey of Website Administrators conducted in June 2025.
5. Project documentation including reports, minutes of meeting and other relevant document, stored on SharePoint, including the response to an email requesting project feed back compiled in December 2024⁴.

As the *SiteWorks* project extends beyond the development of the basic plugins to cover training, support and hosting, it incorporates a mixture of technical and human relationships challenges is could be considered an excellent example of a wide ranging Socio-technical project (Dearden and Rizvi 2009; Mumford 2000). In looking at the usability of the delivered software the Technology Acceptance Model (Davis 1989) has been used as a reference point in the development of the survey questionnaires. Given the demographics of the u3a membership, a further strand that needs to be noted is that of digital exclusion (Mubarak and Suomi 2022; Ueno, Dennis, and Dafoulas 2023) that has a high degree of probability of begin associated with members of the u3a community.

In summary objectives of the report are as follows:

- Provide an broad overview of the complete project.
- Provide an insight into the migration process and the subsequent use of the software.
- Identify key lessons learnt.

1.3 Methodology

All the surveys were prepared by individual member of the *SiteWorks* team and delivered using Google Forms. The distributions of the required link was undertaken by the u3a central office for the Team Leader and Migrators Questionnaire, by the migration team using the Beacon records for the Website Administrators Questionnaire. The links to the Post Training and Post Migration questionnaires were contained in the workbook. User emails and names were only collected in the latter case.

The numeric data from all the surveys was extracted from the Google Form CSV download using a number of custom Python Scripts, which also extracted the text of the open-ended questions. To save time the initial summarisation was undertaken using ChatGPT, followed by manual editing. In some cases very few responses were returned (typically < 3), in these cases no editing was undertaken - these are identified with “No summary provided” in the text. Due to the way the respondents interpreted the open-ended questions a degree of repetition occurred between similar questions - some of this still remains in the summary text for different open ended survey questions.

1.4 Report Structure

The report is structured as follows, Chapter 2 provides a brief overview of the project, this is followed by the analysis and subsequent discussion of the survey results and other available material, in Chapter 3. The key points and conclusions are identified in Chapter 4.

⁴>Knowledge and Retention>Minutes and Emails>Implementation.Review.31.12.2024.pdf

The data from the surveys is provided in a number of appendices due to their length: Appendix A for the *Migration Progress Data*, Appendix B for the *Workbook Questionnaires*, Appendix C for the *Project Team Questionnaire* and Appendix D for the *Web Managers Questionnaire*. Other information provided includes a list of third party plugins used, Appendix E and Server Memory used in Appendix F.

NOTE ON REFERENCING: This report references documents (minutes of the Team Leaders meeting and Change Board, etc.) stored primarily on the *SiteWork's* SharePoint system. These documents are not formally cited in the Bibliography, but are referenced by their location in the *SiteWorks* SharePoint directory, with *SiteWorks > Documents > General.....* followed by the exact document location and title as a footnote.

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Chapter 2

SiteWorks Overview

SiteWorks is primarily a group of plugins running under *WordPress*, developed to replace *Site Builder*, to supply a website to individual u3a with a consistent and modern look and feel. In addition *SiteWorks* is being made available to new affiliated u3as, non *Site Builder* u3as, Regions, Networks and individual Subject Advisers. The complete *SiteWork* package consists of the following¹:

- An easy-to-use u3a branded website that is accessibility, compliant and ready for an individual u3a's content, with an easy route to migration for *Site Builder* to *SiteWorks*.
- Content that is viewable on different devices, primarily mobile devices and tablets.
- Individual u3a web managers and their assistants were supplied with a self paced workbook and a dummy site to run under LocalWP to learn how to use *SiteWorks*.
- Website Administrators of individual u3as were supported throughout the process from training to migration and going live with the new website.
- A *SiteWorks* Help Desk will provide ongoing and post-migration support.
- The *SiteWorks* platform is centrally hosted with all data fully backed up.

While the software can be considered FOSS, u3as are required to contribute towards the hosting and other related costs, currently this is £50 per annum.

2.1 Software: Design, Development and Migration

2.1.1 Design

The basic specification is contained in "A SiteWorks Website Development System V1.5"² dated 23 February 2023. In the general requirements it states:

This Requirements Specification will not specify the precise details of the general website environment, but the new system will be based on a widely used website development system known as *WordPress*. *WordPress* is software that provides an easy-to-use way of website creation, without the need for the user to write detailed website code. *WordPress* will provide basic environmental features such as login user access control and a page editor, as well as facilities for adding specific Themes and other u3a specific features specified in this document. This document will also not specify generic features of *WordPress*, such as ease of access, provision of editing for pages, headers, footers etc., as these features are widely documented elsewhere. The generic name of the *WordPress* website development system, customised for use by u3a, will be known as 'u3a SiteWorks'.

¹<https://www.u3a.org.uk/members-area/support/siteworks>, currently visitors have to register to access this page.

²> 05 Document and Training Docs > Requirement Doc

The document then details the theme, the default pages and navigation structure, security and updating. In the initial testing and developments, the document was followed, to provide a framework for the development of the *SiteWork* plugins. However, reviewing the document after migration had concluded, a number of areas were not noted or discussed, namely the training requirements, GDPR³ and Cyber Security⁴.

2.1.2 Delivered Software

SiteWork Specific Plugins

To configure *WordPress* for use by u3as and other users, two sets of plugins are required. Firstly a number of plugins specifically written to replicate the features required by the u3as, effectively replicating *Site Builder*⁵. Secondly a number of carefully selected third-party plugins to provide the infrastructure for the custom plugins to operate, as well as providing a number of presentation and security features. The plugins used are listed below.

The following plugins were developed as part of the *SiteWorks* project:

- u3a SiteWorks Contact Form** Provides a shortcode⁶ to create a secure contact form for emails.
- u3a SiteWorks Core** This plugin provides facilities to manage u3a interest groups and events, and to store related contact and venue information.
- u3a SiteWorks Dashboard** Allows the Administrator to place information on the *WordPress* Dashboard for their Editors and Authors.
- u3a SiteWorks Import Export** Provides facility to import and export CSV data files, to help populate the site.
- u3a SiteWorks Maintenance Mode** Places the website into maintenance mode, which prevents the site from being accessed by external visitors, for example, during planned maintenance.
- u3a SiteWorks *WordPress* configuration** This plugin disables the *WordPress* comments facility, removes unnecessary material from the HTML head section, disables access to the user's rest endpoint, and changes to the administration menus.

Required Third-Party Plugins

The following third-party plugins are required to run a minimal site and are included in the *SiteWorks* distribution.

- Gutenslider** An image slider and video slider plugin for *WordPress* that adds a simple-to-use Gutenberg slider block to the block editor
- Independent Analytics** Provides website analytics for the web manager and hence the individual u3a committee's.
- Imanity** Resizes oversized images uploaded to your website to avoid sluggish performance, particularly on mobile devices. The default is a maximum width or height of 1920 pixels (Full HD screen size). This is handled completely automatically and content creators uploading images do not need to know anything about scaling images.
- Lightbox for Gallery and Image Block** Adds a Lightbox feature to the gallery, slider and image blocks.
- Loginizer** Loginizer is a *WordPress* plugin which helps prevent brute force attacks by blocking login from an IP address after it reaches the maximum retries allowed. The *SiteWorks* Administrators can blacklist or whitelist IPs for login using Loginizer.

³See <https://www.gov.uk/data-protection>

⁴An overview is given at <https://www.ncsc.gov.uk/collection/10-steps> and <https://www.gov.uk/guidance/protect-your-charity-from-cyber-crime>

⁵GT

⁶See <https://siteworks.u3a.org.uk/docs/additional-block-options>

MainWP Child Allows the System Administrator to support a local u3a's website by managing the plugins and themes

Meta Box Create custom meta boxes and custom fields in *WordPress*.

Meta Field Block Provides custom fields.

A number of u3as have added additional third party plugins or developed specific plugins to enhance the capabilities of their site, these are listed in Appendix E. It is important to note that the *SiteWorks* system administrators take a proactive response to any installed plugin that will compromise the security of either local sites or the complete system, this is fully discussed in the documentation⁷.

During the initial development phase **LiteSpeed Cache** was added to the *SiteWorks* distribution to reduce the server load, provide faster delivery of pages to users and provide increased resilience to denial of service attacks. After extensive real world testing, the plugin caused significant issues in the sites where it was activated. For this reason it has been agreed at the project Team meeting of the 4 December 2024⁸ to remove the plugin from the distribution and from all sites.

Theme

A *WordPress* theme is a collection of templates and style-sheets used to define the appearance and display of a *WordPress*-powered website. Themes control the layout, colour scheme, typography, and overall design, allowing local u3as to customise their site without altering the core code to ensure commonality in text sizes, fonts and colour palette as defined by the u3a brand (u3a 2022). The developed u3a theme also provides built-in features including Group and Event Widgets, a secure contact form and notices.

2.1.3 Development Cycle

While it could be argued that the development of the software approximately followed the agile development principles (Al-Saqqa, Sawalha, and Abdelnabi 2020), formal rules or methodology were not imposed. While the development was undertaken by a team of volunteers, the majority has extensive software experience either in industry or academia. The following characteristics of the *SiteWorks* development align with the agile principle:

- The test team consisted of early adopters and pioneers (see Section 2.2.1 for further details) this ensured that there was “customer” satisfaction and ownership during the early stage of the development cycle.
- The development team welcomed changes or modifications through out the process.
- Weekly meetings to monitor process.
- A considerable amount of face-to-face discussion took place within testing and development teams.
- Progress was effectively measured by the difference between the needs of the customers (u3as) and the ability of the software to meet those needs.
- The use of suitable software tools to support the project, in particular *OpenProject* to manage the process, *GitHub*⁹ to manage, control and share the software during development and *Teams* and *SharePoint* for communication and document sharing.

As the development cycle moved forward:

- An report, *U3A Plugin Audit*¹⁰ from an external company, Elementary Digital, was commissioned to provided information on any security issues or other vulnerabilities before any site went live. The report, while undated was circulated via email to the Project Team on 21 September 2023¹¹ made a number of recommendation that have been or were being implemented. A number of recommendations, such as the use of Re Captcha on forms and the use of Two-factor authentication for login are open for discussion.

⁷See <https://siteworks.u3a.org.uk/docs/plugins/>

⁸>Knowledge and Retention>Minutes and Emails > TL.meeting.04.12.2024

⁹see <https://github.com/>

¹⁰> Knowledge and Retention>Development>U3A.Plugin Audit.pdf

¹¹>Knowledge Retention>Development>NT_project.team.21.09.23.pdf

- To control and moderate change request, a Change Board was instituted, first meeting in November 2023. The Change Board is responsible for reviewing requests entered into OpenProject and their approval. Its role is to verify that the proposed changes to *SiteWorks* align with the overall goals and objectives of the project, and do not degrade either the performance or user experience. In particular to avoid specification creep and ensure any changes are beneficial to the majority of u3as. When recommending changes, addition features, etc. in any decision it makes the Change Board considers the effort required both from the testing and development groups. The Change Board has the task of confirming the requirement to issue a new or revised release note. Since the first meeting the Board has met 24 times and approved over 20 release notes¹². Implement a software change the process in Fig. 2.1 needs to be followed, which is summarised as follows:
 - A request for an enhancement, resolution of a bug is added to the OpenProject system, at which point it is considered by the Change Board.
 - If approved the development team implements and undertakes testing. Once completed and approved it is uploaded to all *SiteWorks* sites automatically by the System Administrators. In parallel with this a formal release note is produced, to provide test use cases.
 - Some enhancements, will initially approved by the change board, can be rejected by the development team, if issues are uncovered at that time.

¹²These documents are available >12.Release Management>Release Notes>....

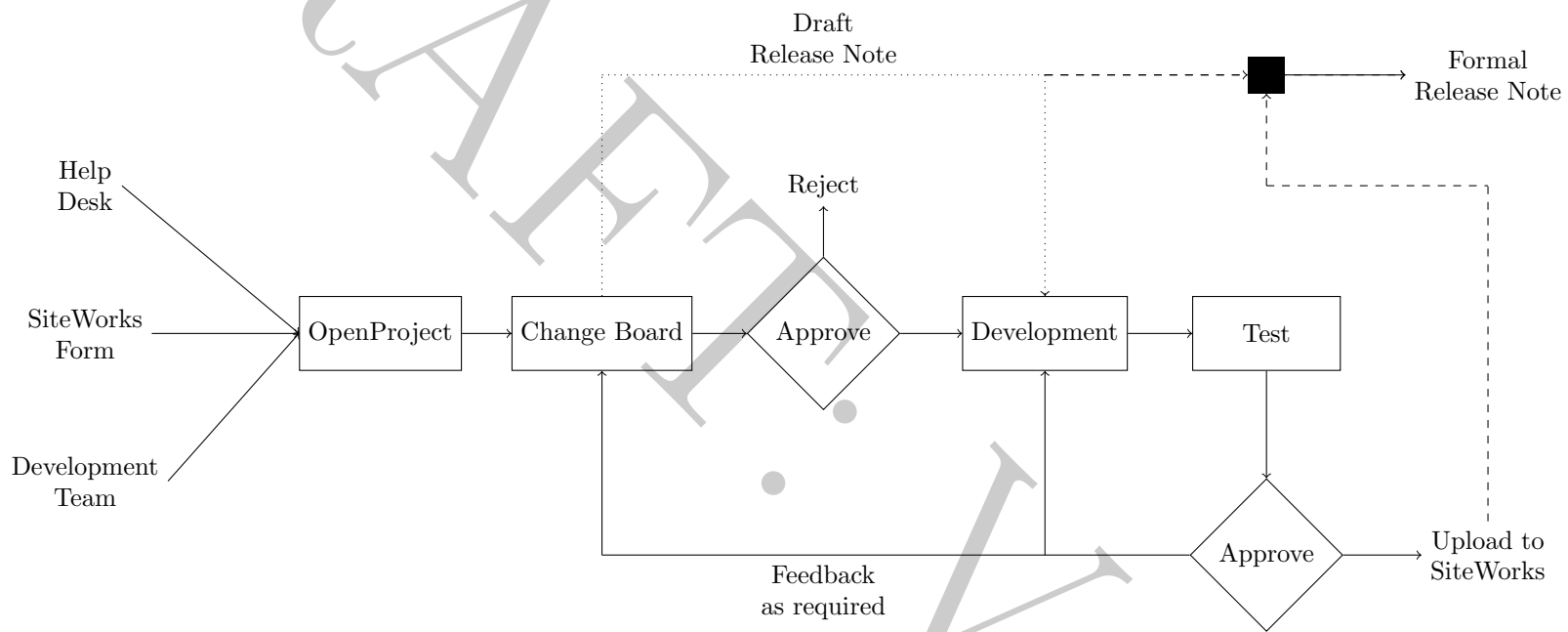


Figure 2.1: TOverview of the Change Board process.

2.2 Obtaining a *SiteWorks* site.

2.2.1 Migration

Once the T&C had been finalised and the software validated migrating of the u3as commenced, the migration process stated in November 2023. To manage the process the *Beacon* system was used. The migration process is summarised in Fig 2.2 and consisted of a number of stages:

Registration

A number of email were sent to over 730 users of *Site Builder* inviting them to join the programme to migrate to *SiteWorks*. The users included individuals u3as, Networks and Subject Advisors. Depending on the email and the response, migrating u3as were allocated to a number of different batches:

- A small number of *Site Builder* sites responded to an initial email and were defined as early adopters or Pioneers. Over time a number of separate tranches were defined as 2A, 2B and 3 depending on how and when they were identified. For convenience these are identified as the *Initial* batch of 52. This batch also included a limited number of SiteWorks Team leaders.
- Following a general call to all u3a's using *Site Builder*, over 400 sites responded - this formed the bulk of sites that were formally invited to migrate between January and March 2024, with invitations issues in batches of approximately 40 on a weekly basis, these constituted batches 1 to 13.
- It was noted that when compared to the *Site Builder* data, 137 sites still had not registered. These were individually chased and those which proceeded to migration were identified as *add-ons*.
- It was noted that the initial T&C were not fit for purpose for Networks or a number of very small u3as, hence TAT and TATTTL developed an alternative set of T&C, which were sent out as a separate mailing.

Terms and Conditions Issued

Registered users were issued the *SiteWorks* Terms and Conditions¹³ in the predefined batches. These required committee approval and a response via the u3a portal. The following points should be noted, as they introduced delays into the process:

- It was reported that a not-insignificant number of u3a secretaries and/or committee members had difficulties with accessing the portal.
- While the invitations to join the process were issued by the Project Team, the portal replies were received by TAT and subsequently passed to the I&E team, this could be considered to be a rather inefficient process.

Induction via Zoom

Once signed, the Website Administrator for each u3a was invited to join the zoom induction session, this lasted approximately 1-2 hours depending on the length of the question and answer section. This step was considered mandatory to all migrating sites.

Workbook

Only after the completion of the Zoom meeting were Website Administrator issued with the Workbook and undertook self-paced training¹⁴ using *LocalWP*. The documents issued were Workbook for Web Managers *Migrating to u3a SiteWorks, Version 1.0 January 2024*¹⁵ and subsequently *Update to Workbook for Migrating Web Managers Incorporating WP6.5 + u3a plugins, May 2024*¹⁶.

¹³> 15 Terms and Conditions > Archive

¹⁴For clarity Web Managers were trained, i.e. they were being trained to undertake specific tasks to maintain their *SiteWork* site, they were not expected to learn a range of generic web authoring skills.

¹⁵>Knowledge and Retention>Training Documents>Workbook for Migrating Web Managers V1.0 0101 2024-2.pdf

¹⁶> Knowledge and Retention>Training Documents>Workbook update 0524 WP6.5 and plugins.pdf

It was recognised the not only would a u3a have a *SiteWork* administrator, but also a number of authors and editors roles¹⁷. To support the training of authors and editors within an u3a, a *Author Training Guide. V01, February 2024*¹⁸ was also issued to those who attended the Zoom inductions.

Site Design and Authoring

Once the Website Administrator had gained a degree of confidence from the self paced workbook, they contacted the migration team and were (a) allocated a migrator and (b) a copy of their current *Site Builder* site in *WordPress* format. This allowed the new site to be designed and authored.

Optional Assisted Migration

In September 2024 it was noted that a small number of u3as had signed T&C but had made little or no progress in migration. It was recognised by the project team that support in excess of the normal migration support was required, so the concept of *Assisted Migration* was introduced. In these cases the migrator took on some of the editing and finalising of the *Site Builder* extracts as well as acting as mentors. The 24 sites that accepted this offer were typically small u3as with limited resources, or the webmaster had external constraints (e.g. illness, care responsibilities) the caused on going delays¹⁹.

Going Live

The site is made active and redirections put in place. In some cases this depended on the u3a committee's approval of the design was required. At this time a redirection was placed on the *Site Builder* web site to the corresponding *SiteWorks* site, this redirection lasted for three months. In addition the live site was added to the map²⁰ showing all u3a in the UK. A cut-off date²¹ of the 31 December 2024 was agreed (later modified to 13 December 2024 due the Christmas Break) when the project would move from Migration to Business as Usual, this was largely governed by the three month redirection period required by the last migrated site going live, given that *Site Builder* would shut down in April 2025.

Post Migration

Once a site has gone live, the Website Administrators had access to a range of documents and a help desk via the main website at <https://siteworks.u3a.org.uk/>.

2.2.2 Business as usual

Once migration was completed, the project moved to a Business as Usual phase. The process to gain a *SiteWorks* site is broadly similar to migration, but is supported by different documentation, in particular the *SiteWorks Administrator's Guide*²² and the *SiteWorks Editing Guide: Foundation & Quick Start*²³

To support Website Administrators the following options have been considered and/or implemented:

- A weekly drop in session is currently provided, the number of attendees averages 20.
- Consideration was given to ongoing support via a Web Managers User Group, which was external to the project team, but had direct input into the Change Board to request and assess modifications. Currently the WMUG is on hold.

¹⁷In *WordPress*: Authors can write, edit, and publish their own posts, but can't modify posts written by other users. An author can only delete their own posts, even when published. While an editor can edit, publish, and delete any posts on the site, including the ones written by others.

¹⁸> Knowledge and Retention>Training Documents>SiteWorks_Authors.pdf

¹⁹See *Assisted* sheet in >Knowledge and Retention>Migration Spread Sheets>Migration_Summary_14.12.24.xlsx

²⁰<https://www.u3a.org.uk/get-involved/find-your-local-u3a>

²¹>Knowledge and Retention>Minutes and Emails>TL_minutes_15.05.2024

²²> Knowledge and Retention>Training Documents>SiteWorks-Foundation-Administrator-Guide-05-2025-V1.1.pdf

²³> Knowledge and Retention>Training Documents>SiteWorks-Foundation-Editing-Guide-05-2025-V1.1.pdf

2.3 Server Considerations

The current situation regarding server capacity is shown in Appendix F. Since between July and August 2024, the overall disk storage has grown from 359GB to 374GB (an average of 529MB per site), Fig 3.2. This included a net increase of three hosted sites in the period. The server currently has 920GB of usable storage, so we are operating well within our capacity.

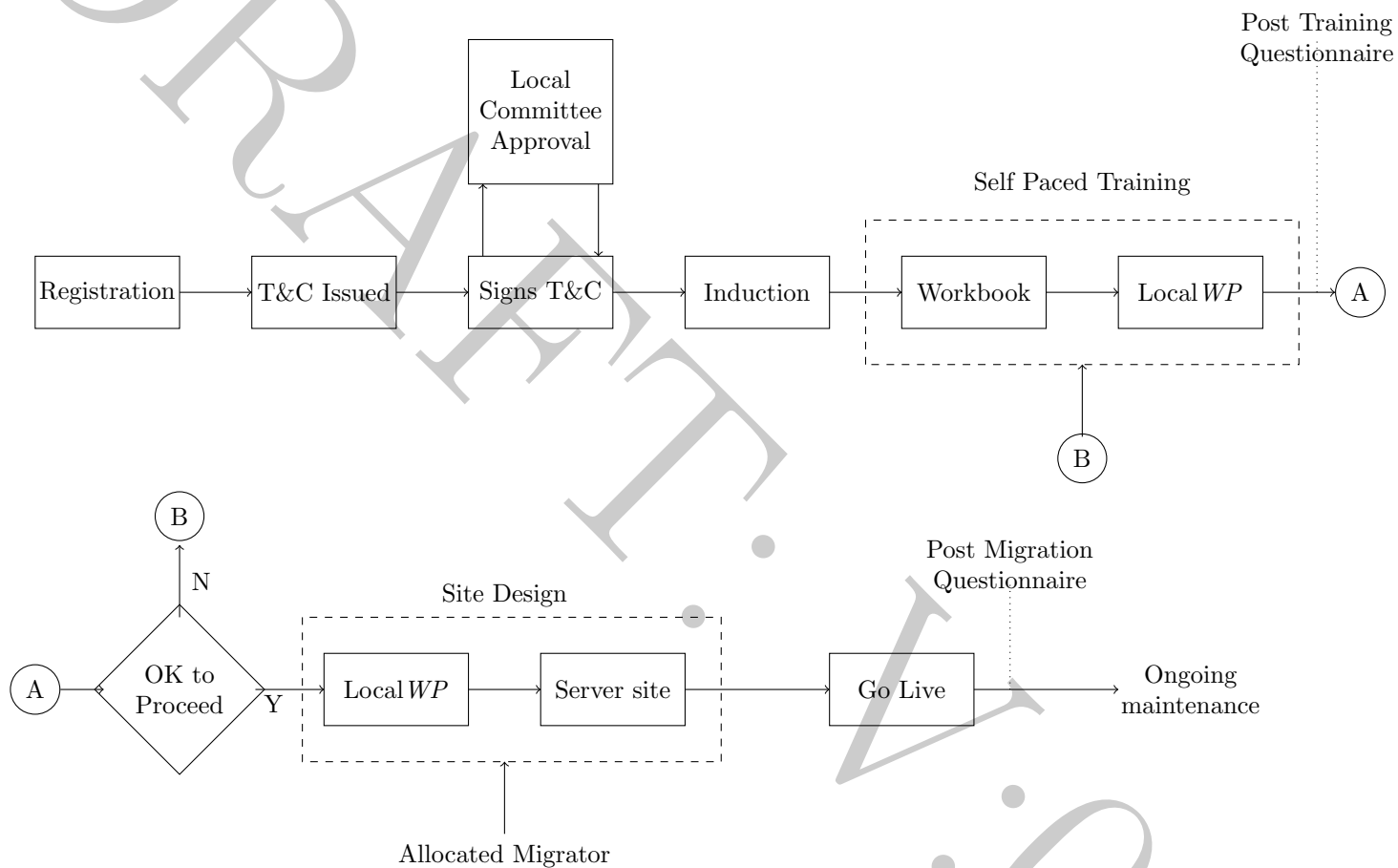


Figure 2.2: The migration process. The judgement regarding OK to proceed to made solely by the website administrator undertaking the training using the workbook.

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Chapter 3

Discussion

This section provide the discussion for the survey results. The key objective is to examine the key points, trends, comments etc., so that an overview of the *SiteWorks* project can be gained, it is not to report on a detailed statistical analysis of the data, as normally expected when generating the Technology Acceptance Model and similar models. To compile this report the primary sources were a number of surveys as listed in Table 3.1, together with the minutes of the Team Leaders Meeting and the Change Board.

The response rates to the questionnaires and surveys are given in the Table 3.1. It could be argued that the somewhat disappointing response rate may skew some of the results. however as widely discussed there are a number of key drivers that are required to generate a large number of responses, including reward (Bista and Saleh 2017). To obtain statistically significant results for the migrating sites, a sample size of approximately 230 out of 600 is required to ensure the margin of error of 5% (Ahmed 2024). The team leader survey does not pass the significant sample size tests, but the results are still provided as the comments and observations are considered valid and important.

Instrument	Requests	Responses	Rate
Workbook Questionnaire: Post Training ^a	676	113	17%
Wordbook Questionnaire: Post Migration ^a	676	54	8%
Team Leader Survey ^b	41	7	17%
Website Administrator Survey ^b	1000 ^c	404	40%

Table 3.1: Response Rates for the surveys used to compile this report. Note: ^a these link for these surveys were contained in a workbook and were not highlighted to the user, ^b the link for these survey was emailed to the sample group, with follow up emails. ^c this number is subject to confirmation.

3.1 General Observations

Looking across the whole project the following general observations/comments can be made.

- In any future program or project, which goes across multiple u3as, a centralised approach to data collection should be implemented, To compile this report a number of uncontrolled¹ spreadsheets maintained by individuals were used, with little or no commonality in quality or terminology.
- A degree of expectation management needs to be implemented regarding some of the technical issues, it is clear that a number of not insignificant issues, for example the *WordPress* Media Library and its user interface are outside the control of the Project Team.

¹An uncontrolled document is defined as a document not formally approved, reviewed, or updated according to guidelines and lacks necessary controls and oversight for accuracy and reliability.

3.2 The Migration Process

The collected data regarding the migration is given in Appendix A: *Mitigation Progress Data*, Appendix B: *Workbook Questionnaires*, and in Section D.2 of Appendix D: *Migration section of the Web Managers Questionnaire*.

3.2.1 Time to Migrate

Figure 3.1a shows the time to migrate from the issuing of T&Cs to completing the migration process, the figure clearly shows that batching of the invitations to enter the migration process. It is clear that some of the earlier sites, took what could be considered to be an excessive time to complete the training, design and implementable process. As each u3a is unique in both its priorities and willingness of their volunteers to work on SiteWork, this variation is understandable but from the project teams perspective frustrating (see Section C.2)

As shown in Fig B.3, it was not uncommon for individual users to spent up to 40 hours solely on Part A of the Workbook, this as the majority of respondent noted was spread over a number of weeks due a wide range of commitments include acting as carers. The time spent on design and implementation is shown in Fig B.5, though for a small sample size. It should be noted that was no correlation between the website design and implementation times.

A more detailed breakdown of the times are given in Table A.2, while the overall median was 185 days, the individual histograms of the batches Figs A.5, A.6 and A.7 show the variation in time to complete the migration process. An additional point to note is that some Website Administrators noted that committee support was somewhat mixed, Fig D.5d.

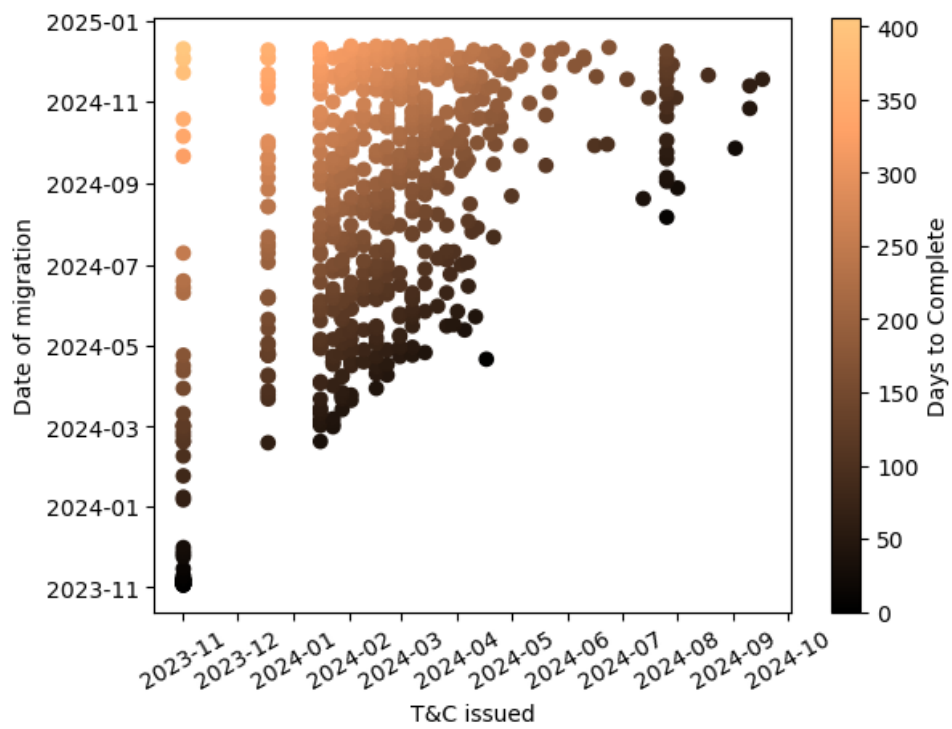
3.2.2 Migration Process

:

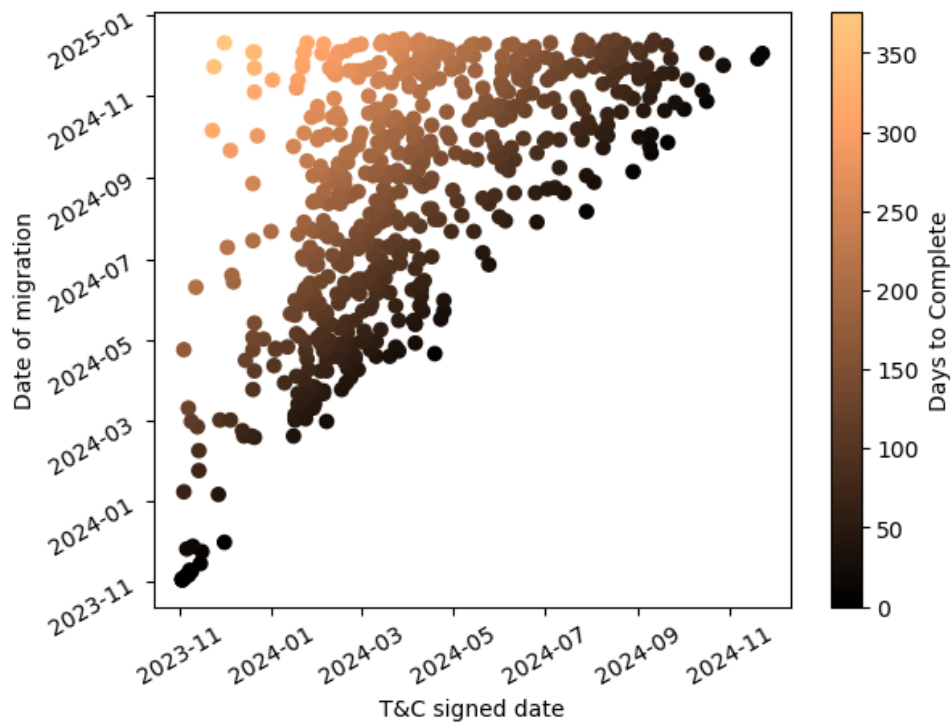
- As noted in December 2024 implementation report² initially TAT offered to distribute 50 invitations a month. This was considered unacceptable, and as a result the I&E team took over the emailing (see email *Training update 17 January*³). This email also noted that the initial batch of invitations sent by the TAT was subject to errors, particularity regarding email addresses for web managers, leading to a second attempt.
- While the workbook questionnaires or the u3as migration registration did not capture the skill levels of those involved in migration, the Web Managers Questionnaire did, of the 329 respondents who were involved in migration, 202 (61%) had previous experience with websites.
- The on-line introductory session were well received and proved to be useful. The feedback on trainer's quality was extremely positive (Q2 and Q3 in Fig. B.1a)
- The majority of respondents indicated that from their perspective the migration process went smoothly (Fig. D.5a), and was rated as excellent, helped by high quality documentation (Fig. D.5b) and excellent migrator support (Fig. D.5c). These results broadly align with the results from the Workbook Questionnaire (Fig. B.2 and Fig. B.4). As noted from the response to Question O in Fig C.1b, communication between the Project Team and u3as in general were good, but as always the case there were outliers, in fact a least two u3a did not respond to any communications from the project team, Table A.1.
- A point to be noted was that some involved with the migration commented that the training documents provided were excessively long. Given that 33% of respondent had prior experience in setting up and configuring websites, this is perhaps not totally unexpected.

²See page 2 of 3 of >Knowledge and Retention>Minutes and Emails> Implimentation.review_31.12.2024

³location



(a) Date of issuing the T&C and date of going live mapped against the time to complete the migration process, (n = 648)



(b) Date of signing and date of going live mapped against the time to complete the migration process, (n = 648)

Figure 3.1: Time with the migration process

3.3 Site Works

3.3.1 Usability

The responses in the Web Manger's questionnaire in particular those in the question "*Please comment on any matter relating to the current SiteWorks product, for example where improvements or where changes are required. Please consider the complete SiteWork package, including software, user support, training and documentation.*" indicated a high degree of user satisfaction and support for *SiteWorks*. This is supported by the responses to the question "Regarding your *SiteWorks* site" given in Fig. D.9, in particular the confidence in the underlying technology, backup and security.

The training that the project team gave to the user community can be judged to be highly satisfactory, as the majority of users Agreed or Strongly Agreed that were confident which the major features of the system. However two aspects show some degree of concern namely development of a Query Loop and to a lesser extent optimising the page formatting for mobile devices, Figure D.10.

As with any system of this type a number of users considered that certain features were missing (see Section D.4). While some of these could be argued to be individual u3a specific, the following general points were noted:

Access Control: An ongoing challenge is to balance a more flexible approach to user permissions, while maintaining system security. Currently the change board is investigating this⁴.

WordPress Limitation: Considering Figure D.13 and the comments in Section D.8, it is clear that there is a misunderstanding between which issues can be resolved via plugins (e.g. media library issues) and those which are totally outside the control of the Project Team (e.g. editing tools and the dashboard user interface). However some additional features can be added using plugins, though many Website Administrators may be reluctant to install software from an unverified source. There may be an opportunity for the project team to issue a "highly recommend list" to cover a large proportion of the perceived issues.

Linking with Beacon: There is clearly a need for an approach to synchronise *SiteWorks* and *Beacon* data, both to prevent errors and minimise errors.

e-commerce: A frequently mentioned requirement is the addition of method to collect payments for events etc., as well as an easy tool to provide forms.

3.3.2 Site Usage

It is clear from Figure D.4 and D.7, the website is seen as an information resources for the users to pull information from, rather than the u3a to push. This is understandable as email and to a lesser extent Facebook and WhatsApp are more suitable for this type of activity. It is noted that with for some members there is still requirement for paper or face-to-face announcements, so overcoming the "grey" digital exclusion issue⁵ One of the most important aspects of a website is to have a digital presence in the local community and for recruiting members. Given this finding, the weekly update used by the majority of sites is understandable, Figure D.8.

Figure D.14 does raise a number of issue regarding the number of users, a large number of sites are reliant on a single Administrator or Editor, this policy can be considered to be high risk. u3as should be actively encouraged to consider succession planning.

Table D.4 and Figure D.15 show the size of sites, typically the bigger the u3a the larger the site, in general there are more pages in a site than posts. This confirms the comments from website Administrators that posts were a difficult concept to understand, see "What didn't you like? and What needs to be improved?" in Section B.1.2.

The visitor, views and sessions figures look good, with on average across the majority u3as seeing visitor numbers around 50% to 60% of their total membership with comparable figures for views and sessions. While in an ideal world the visitor figures should >100% of the membership, these number are very promising.

⁴See change board minutes re XYZ

⁵Elderly people who are affected by digital exclusion

3.3.3 Plugins

The Website Administrators survey, Chapter D.6 showed that 20% of the respondents had added third party plugins to their site, Fig D.12a. The full list of installed plugins is given in Appendix E. In February 2025 142 plugins have been installed, rising to 188 in July 2025, though only 13 had been downloaded more than ten times, this equates to less than 15% of sites using plugins. When Table 3.3 and Fig D.13 are compared the main reason for installation appears to be to overcome the limitations of the *WordPress* media library and providing backups for training or development purposes.

	Number of active plugins				
	Over 20	10 to 20	2 to 9	1	Total
Feb 2025	2	6	40	94	142
July 2025	3	10	49	126	188

Table 3.2: Number of third party plugins active in February and July 2025.

Plugin Name	Feb 25	July 25	Functionality
Media Library Organizer	80	91	Add directory feature to <i>WordPress</i> Media Library
WPvivid Backup Plugin	43	54	Backup and migration
Monthly PDF download statistics	6	27	<i>SiteWorks</i> optional plugin
FileBird Lite	16	17	Add directory feature to <i>WordPress</i> Media Library
WP Last Modified Info	15	16	Add modification dates to posts and pages
<i>WordPress</i> Importer	14	16	Importing files from <i>WordPress</i> export format
WP Migrate Lite	17	15	Backup and migration
Duplicate Page	3	13	Editing tool to duplicate pages and posts
WP Migrate Lite Compatibility	15	13	Backup and migration
Enable Media Replace	3	12	Replacing Files in the Media library

Table 3.3: Most popular third party plugin downloads in July 2025

3.3.4 Communications to Website Administrators

The use of the online resources is summarised in Fig D.11, with the FAQs and the User Guides being the most popular, as expected the Forum is not widely used, no doubt due to its highly technical content, and concentration on niche aspects to the majority of Website Administrators. To place the usage of the help desk into context, in August 2024 the help desk received approximately two query per day.

While not covered in the questionnaire, the project team used a number of other communication channels to reach out to web managers including:

- A short monthly bulletin from May 2024 onwards, this contained information on updates, changes in policy etc. confirm
- A WMUG was established in January 2024 and continued until XXX. While the scope and purpose was clearly defined⁶ and a outline Terms of Reference developed⁷, the definition of the relationship between the proposed WMUG, the project team and TAT resulted in a protracted discussion over a number of month, and was not fully resolved. While a survey⁸ resulted in over 360 u3a website add date

⁶>Knowledge and Retention>Minutes and Emails>wwmug.pdf

⁷>Knowledge and Retention>Minutes and Emails>WMUG_manifesto.pdf

⁸>19 WM User Group>SiteWorks Web Manager User Group Survey 1.xlsx

managers being interested in making a contribution, no one, from outside the project team was prepared to convene and run the user group. For this reason the formation of a WMUG is currently on hold.

3.3.5 Server Requirements

Fig F.1 shows the server memory used for hosting the u3a sites, and is summarised in Table 3.4. These figures exclude the hosting requirements for `oversights.u3asite.uk`, `siteworkstest.u3asite.uk`, and `u3asite.uk`, which adds a further 11566MB, diving a total requirement 382,728MB.

Month	No. of Sites	Maximum	Minimum	Mean	Median
June 2025	713	2669	268	510	437
Aug 2025	719	2720	113	515	437

Table 3.4: Server Requirements of hosting u3a sites

While it is difficult to accurately predict growth in hosting requirements, the two month growth from June to August 2025 the hosting requirements for u3a sites rose by 6788MB of which 2672MB came for six new sites, giving a mean requirement of 445MB per site, though it should be noted the median value is approximately 300MB. On the sites live in June, the hosting requirements increase of 4117MB, see Fig. 3.2. While individual websites varied by +666MB to -317MB, the mean was 5MB with a media 0f -3MB. This may indicated that a majority of Website Administrators are implementing a rigid house keeping policy, of deleting files when new files are uploaded via the Media Library. Overall the total hosting requirements rose from 376866MB to 382728MB, or 1.7%.

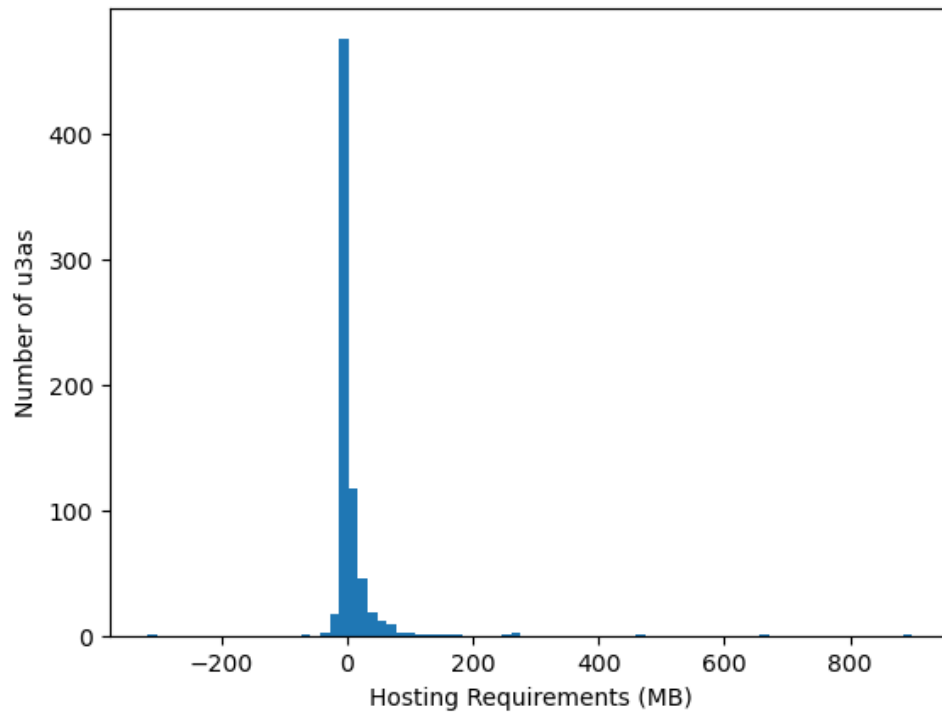
3.4 Site Works Team

The development of the required plugins and their delivery was undertaken by a team of approximately 40 volunteers. As is widely reported Open Source Software (OSS) development is a knowledge focused activity which relies heavily on contributors who can be volunteers or paid workers and are geographically distributed. While working on OSS projects contributors acquire project related individualistic knowledge and gain experience and skills, which often remains unshared with others and is usually lost once contributors leave a project (Rashid, Clarke, and O'Connor 2019). With a project of this nature the changing set of volunteers (particularity among local u3a's), the project knowledge is widely distributed, and should be considered a high risk factor in all future projects of this type.

While the number of responses were low, the following points can be noted:

- The lack of leadership and resources, and communication issues from TAT is noted in Tables C.1a, C.1b, and C.1c was noted as being below expectations. As noted in the feed back from the project team this project impacted on over 70% of the u3a membership and should have a higher profile within the TAT (see Section C.3). This point was also raised a number of times in the project team meetings.⁹
- The project team worked as an effective unit, though at time some expectations were not met Table C.1c. One issue was the detailed project planning, Table C.1c, as noted in the narrative it took some people to pick up a task and push it forward or the project would stall.
- Even with some negative points, the overall score for personal insights, Table C.1d was very high, and no doubt the personal wish to succeed contributed to the overall success of the *SiteWorks* project.

⁹See for example >Knowledge and Retention>Minutes and Emails>TL_minutes.30.04.2024.pdf



(a) Plot for all 713 u3as

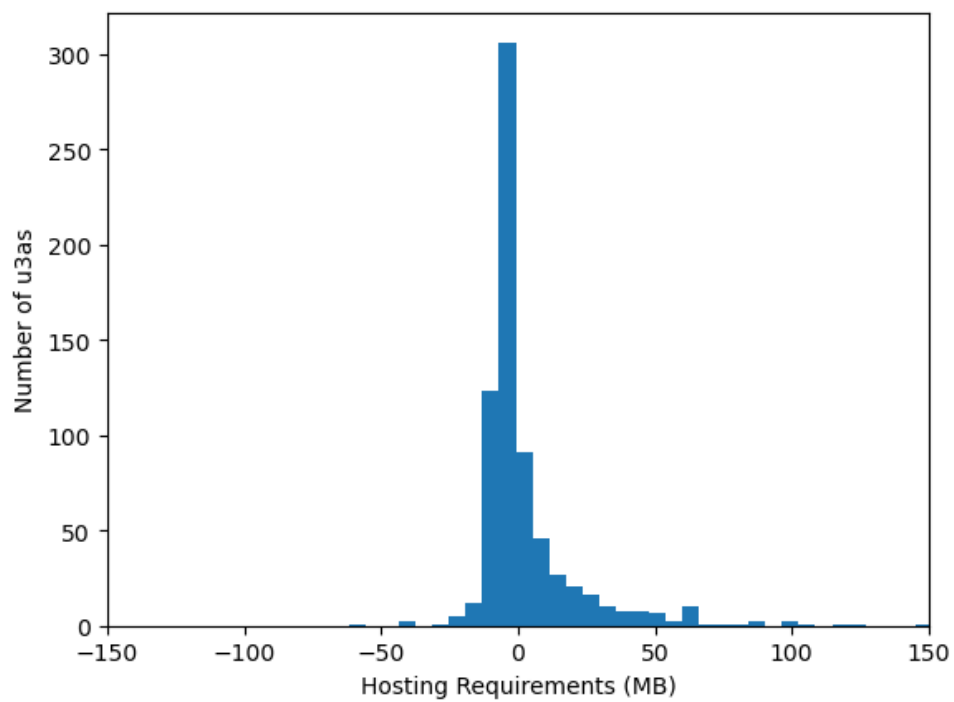
(b) 'Details ± 150 MB

Figure 3.2: Increasing in hosting requirements for all u3a websites from June to August 2025.

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Chapter 4

Concluding Comments

The following concluding comments should be noted:

4.1 Website Administrators

The following were identified across all the web administrators as the key strengths of the *SiteWorks* project:

High User Satisfaction *SiteWorks* is seen as a major improvement over *SiteBuilder*. Positive comments for its ease of use, strong support, and smooth migration.

Support & Training Support team and Q&A sessions were highly valued. Training and documentation was considered strong, especially given volunteer contributions.

User Friendly Designed to help non-technical users and support smooth succession. Most users manage well after a relatively short training period.

Hosting & Maintenance Individual u3as appreciate that they were not required to handle hosting, backups, and related technical tasks

4.2 SiteWork Team Members

Personal Satisfaction: The team members appreciated the interaction with a team of volunteers who were determined to make the project a success. The delivery of a stable high quality product to over 650 u3as gave considerable satisfaction.

Feedback from user community; All the feedback from the Website Administrators to the project team are highly complementary, with excellent training and support through migration to delivery of a high quality product. The ongoing support is currently meeting the needs of the user community.

Challenges: Keeping going when others showed a lack of interest made the project problematic at times. Of particular concern was the apparent lack of TAT involvement and their slow decision making. Given that the project impacted on over 70% of the membership caused concern within the project team, and the loss of at least one team member involved in communications.

4.3 Learning Points for Future Projects of this Type

Data Collection In any future programme, which goes across multiple u3as, a centralised approach to data collection should be maintained, In this report a number of spread sheets maintained by individuals were used, with little or no commonality in quality and terminology.

Communication Strategy It is clear that in any other project of this magnitude, the communications paths between TAT, TATTL, the project team and individual u3as must be clearly defined at the start of the project. Communications to individual officers and members of local u3as must be considered a critical item on any project risk register.

4.4 Items for the *SiteWorks* team to consider

Risk Management in local u3as: A large number of sites have a single Administrator or Editor, should the project team consider (i) encouraging u3a to mitigate this risk by succession planing and (ii) ensure that the core documentation is suitable for a u3a member with little or no IT skills to pick up the task with little effort, at least to keep the site running.

Long Term Support: The risk associated with long term support need to be considered, including maintenance of documentation and bi-weekly sessions. Will the lack of a WMUG be seen as a lack of engagement with the u3as in general and raise issues as links with *Beacon* are considered.

Plugins The use of plugins is seen by a not insignificant number of Website Administrators as an approach to overcome limitation in both *SiteWorks* and *WordPress*. **Thought should be given to issuing a list of recommended plugins to address specific issues.**

Chapter 5

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Appendix A

Migration Progress Data

The I&E team kept records of the progress of each u3a as they moved through the migration process, this Appendix presents this data. Migration of *Site Builder* websites formally ended on the 13 December 2024, the situation at that time is shown in Table A.1, and confirms that over 91% of the sites invited to migrate completed process by that date.

It should be noted that the data regarding used in this section came from two separate sources:

- The figures for presented to Team Leaders weekly meeting, this monitored the flow through the process.
- A spreadsheet used to monitor the process developed and maintained by a member of the Project Team. It should be noted that of the 676 records, 29 (4%) did have missing data or other errors these have been omitted from the analysis.

Invited to migrate	737	100%
Sub-Sites	8	1%
Declined & Mergers	15	2.0%
Dropped Out	28	3.6%
No responses to queries	2	0.25%
Other	8	1%
Migrated Sites	676	91.7%

Table A.1: *SiteWorks* migration as of 13 December 2024, when the project transitioned to Business as Usual.

In considering the information presented in this section the following points should be noted regarding on how u3a were batched to manage the migration process, see Table A.2. As discussed in Section 2.2.1, the batching can be summarised as follows:

- The *Initial* batch of 52 consisted of a number of *Site Builder* website managers, this group was defined as early adopters and named Pioneers.
- Following a general call to all u3a's using *Site Builder*, over 400 sites responded these constituted batches 1 to 13.
- Addition sites who responded later were identified as *add-ons* and had their invitation to sign the T&C issued on an "as required" basis.

A number of u3as did not migrate to *SiteWorks* were varied and included:

- The u3a closed or merged after invitation to migrate had been circulated to the individual u3as.

- A number of u3as, due to their small size could not justify a full site, to covered these a *Sub-Site* model was developed, where a u3a had minimal webpage in a regional site¹. These sites were primary located in Wales.
- A very small number of *Site Builder* sites declined to migrate for a number of other reasons including (i) lack of a suitable Website Administrator, (ii) moving to an alternative website provider or (iii) did not respond to any communication from the project team.

The flow of sites through the migration process is shown in Figure A.1 and Figure A.2. Figure A.1 shows that at the end of the migration period, not all the sites in the process when live, these were reclassified as “business as usual” and carried forward, and omitted from the final migration count. the situation was reported in December 2024 project team meeting²³.

The time required for a u3a to sign the T&C is shown in Fig. A.3. While many Web Administrators responded in a reasonable time to get T&C signed, a not insignificant number took a considerable amount of time, with a number of u3as taking over 150 days to sign. Finally, Fig 3.1a shows the time for a site to move from signing T&C through to going live.

Following signature of the T&C, Website Administrators were invited to a on-line induction process, held on zoom. Over the migration period:

- 44 separate on-line induction sessions were held.
- Users of 694 websites attended and subsequently issued with the workbook.
- In many cases more that one person attended the zoom briefing for an individual u3a, so as to spread the load within those u3as. It is estimated that over 1000 u3a members attended these sessions

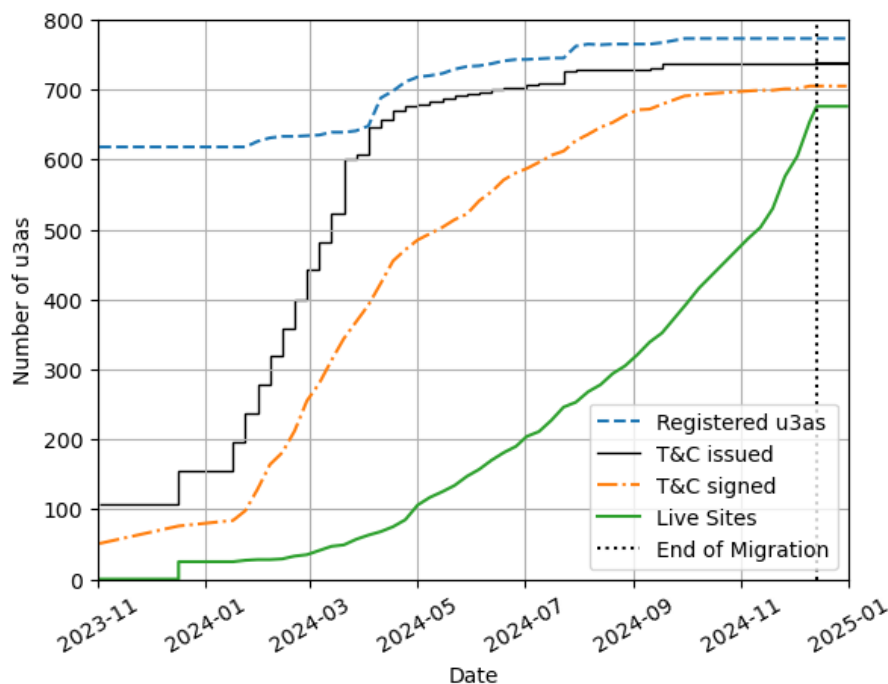


Figure A.1: The number of registrations received, T&C issued and signed and the number of live sites over the migration time period. The T&C were issued in batches by the *SiteWorks* team as discussed in Section 2.2.1.

¹e.g. see <https://wales.u3asite.uk/preseli-u3a-home/>

²See >Knowledge and Retention>Minutes and Emails>TL_meeting_O4_12_2024.pdf.

³See >Knowledge and Retention>Minutes and Emails>taining_update.11.12.2024.pdf.

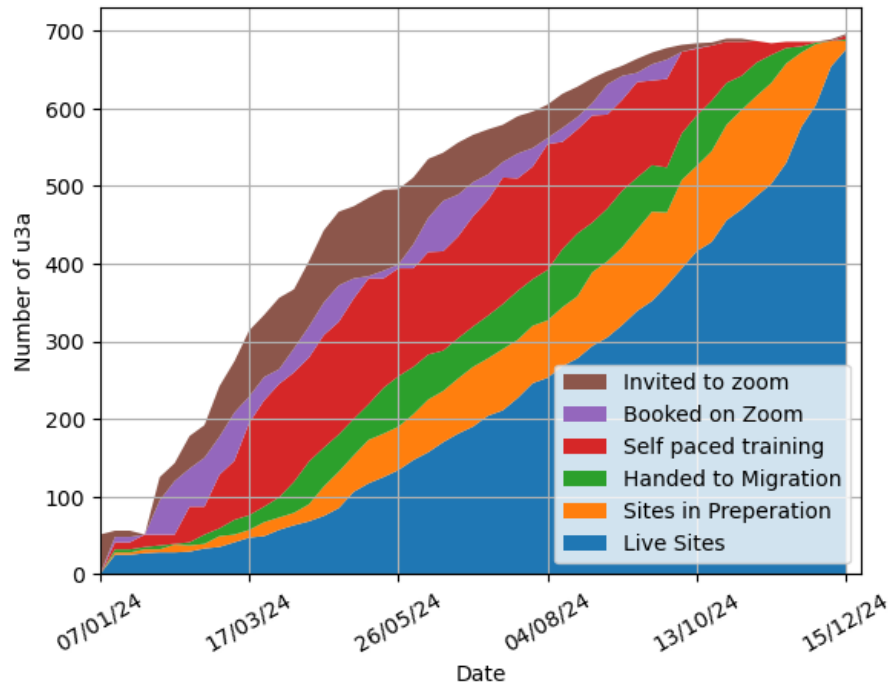


Figure A.2: Overview of the u3as moving from their invitation to join the Zoom induction meeting, through to going live. It should be noted that the *Self Paced Training* category includes the number attending the zoom induction sessions.

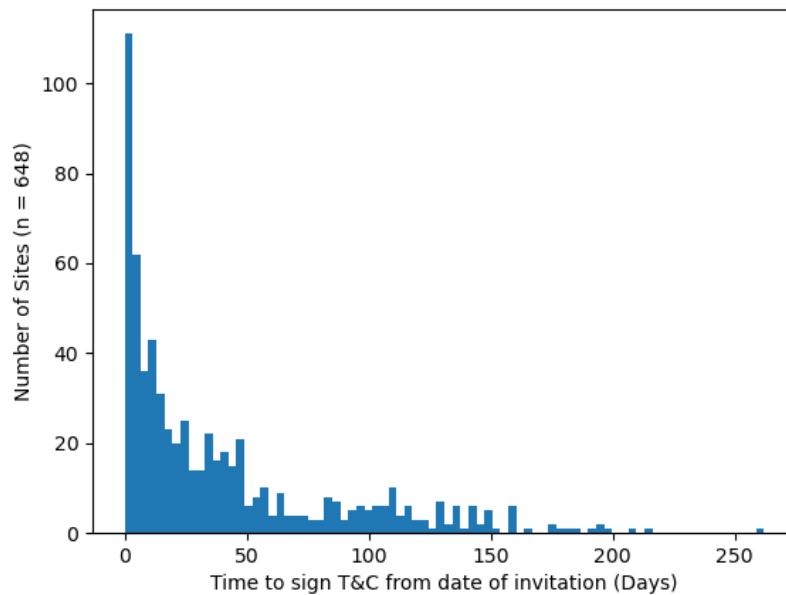
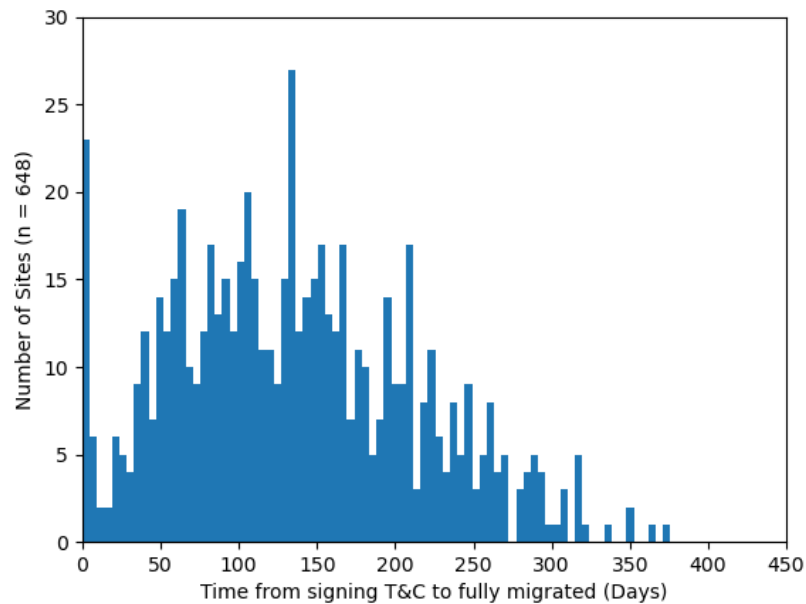
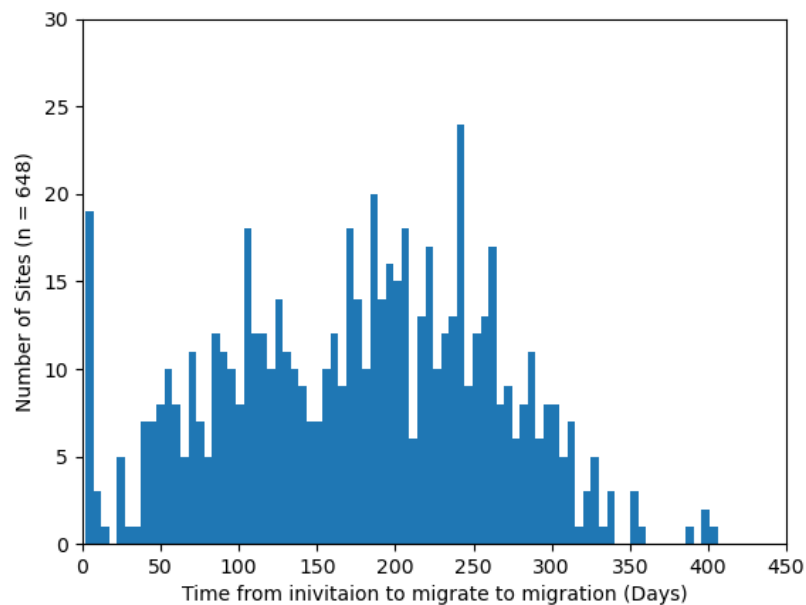


Figure A.3: Number of days for a u3a to sign their terms and conditions, ($n = 648$, mean = 40.6, median = 22). Over 135 sites took in excess of 70 days to sign the T&C.

In considering Fig. A.4a and A.4b, it should be noted that some u3as went live on the day or very shortly after they returned their signed T&C. This was due to the project having issues with hosting and hence a number of sites were finalised prior to the hosting being confirmed. Once hosting was confirmed,



(a) Number of days for a *Site Builder* site to migration process following the signature of the terms and conditions. (n = 647)



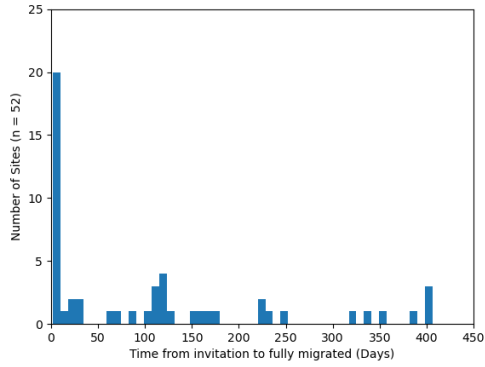
(b) Number of days for a *Site Builder* site to migration process following the invitation of the terms and conditions. (n = 647)

Figure A.4: Time to complete the migration process from two perspectives.

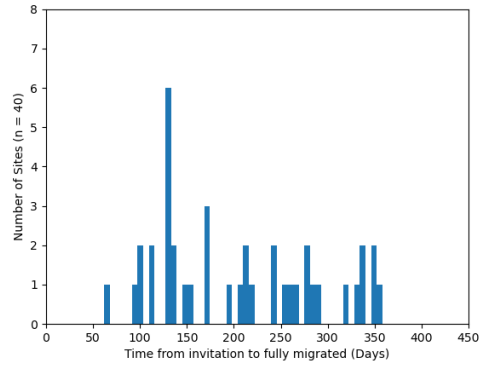
the Pioneers and similar sites could go live as soon as the signed T&C had been received, giving an effective migration time of a few days.

Batch	Size	Mean	Media	Min	Max
Initial	52	108.96	67.0	2	406
1	40	206.7	201.5	62	358
2	52	194.58	188.5	34	330
3	38	175.89	186.0	38	316
4	39	168.33	158.0	46	313
5	40	175.78	168.5	48	315
6	36	210.64	208.5	70	305
7	38	171.16	171.0	43	301
8	41	189.17	193.0	47	294
9	37	203.54	218.0	54	288
10	36	182.25	202.5	48	277
11	35	198.77	210.0	43	273
12	24	215.38	244.0	71	267
13	20	174.9	185.5	51	263
Add Ons	104	165.76	182.5	4	247
Networks	15	85.6	94.0	11	136
Overall	647	176.84	185.0	2	406

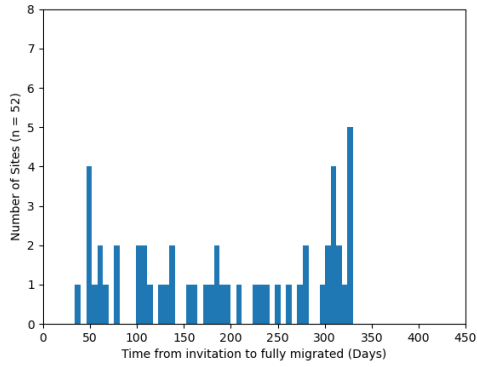
Table A.2: The mean, median, maximum and minimum times for the batched websites, from the receipt of the invitation to migrate to going live.



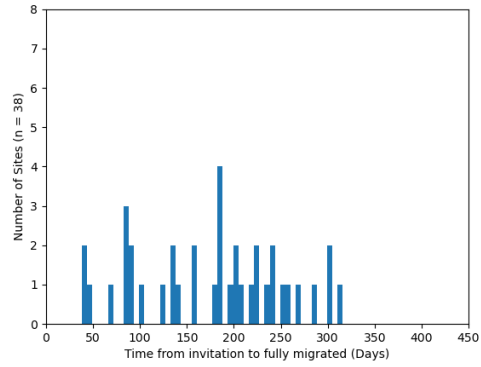
(a) Initial Batch (n = 31)



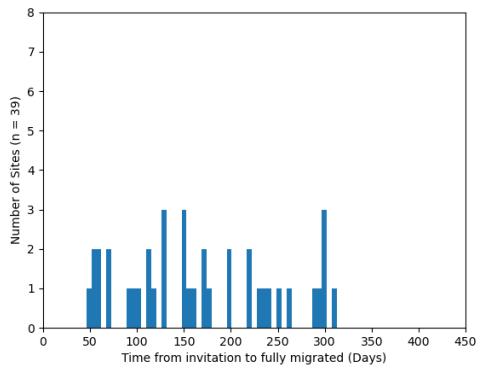
(b) Batch 1



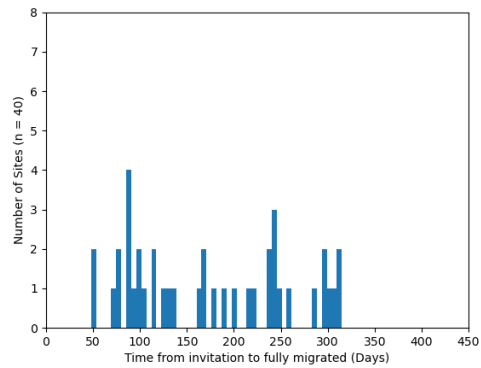
(c) Batch 2



(d) Batch 3

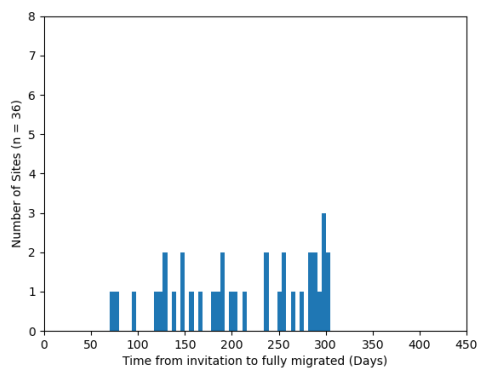


(e) Batch 4

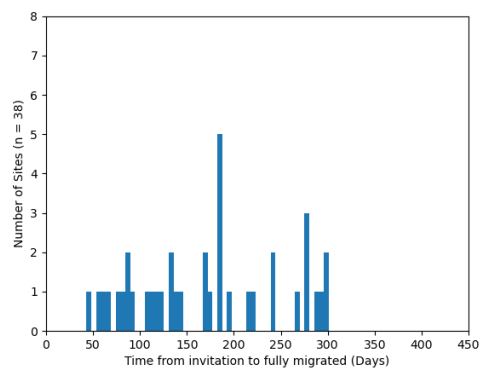


(f) Batch 5

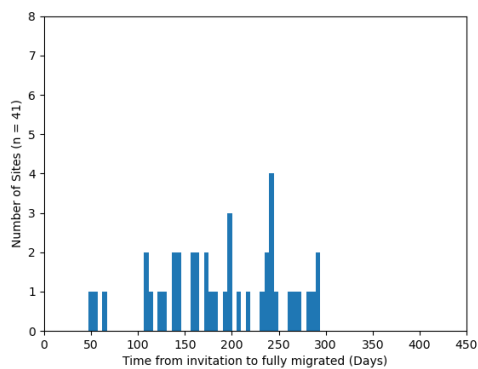
Figure A.5: The time from issuing the Terms and Conditions to going live for the initial batch and batches 1-5. Note the scale of (a) is different to all the other plots in this figure.



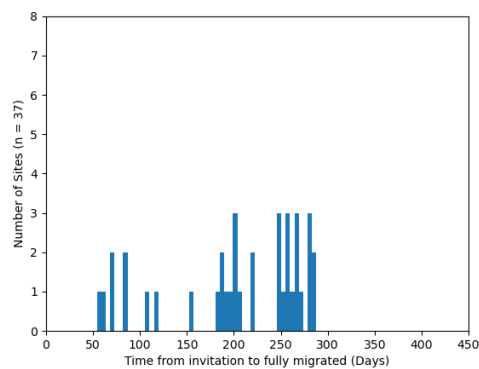
(a) Batch 6



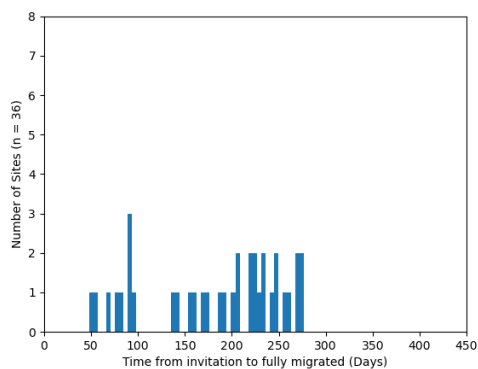
(b) Batch 7



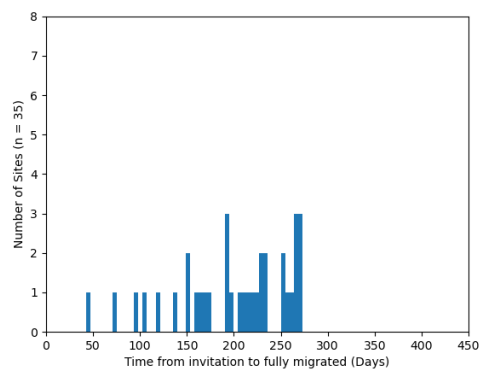
(c) Batch 8



(d) Batch 9



(e) Batch 10



(f) Batch 11

Figure A.6: The time from issuing the Terms and Conditions to going live for batches 6-11.

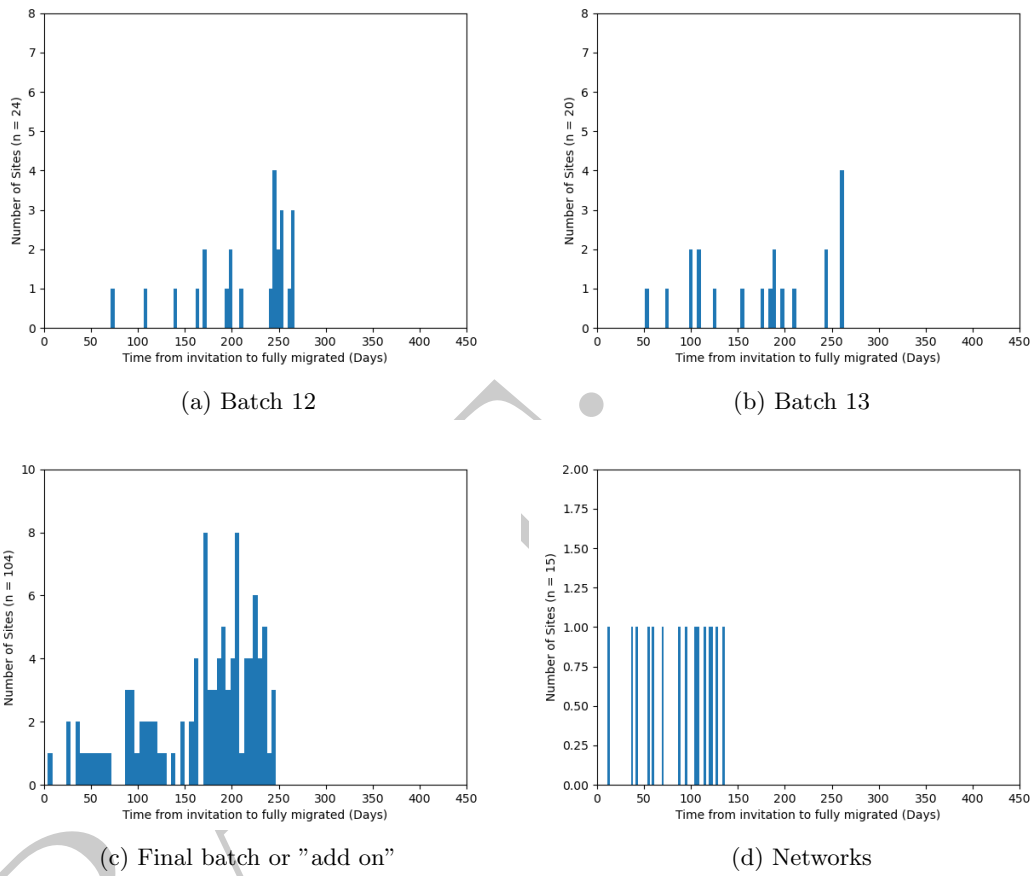


Figure A.7: The time from issuing the Terms and Conditions to going live for batches 12, 13 together with the Add-ons and Networks. Note scale change for graphs (c) and (d).

Appendix B

Workbook Questionnaires

In the workbook provided to the Website Administrators after the initial *Zoom* based training session, two questionnaires were provided: Website Administrators were invited to complete a Post Training questionnaire as they moved from the self paced training to designing their respective site using *LocalWP* and a Post Migration questionnaire on completion of the process.

The Post Training questionnaire was first issued to the Phase 1, 2, 2a Pioneers, of the 63 possible respondents, 13 (21%) responded, and an interim report given to the *SiteWorks* Team Leaders on the 4 November 2023, see "Training & Migration Feedback Summary: Introduction & Part 1 of the Workbook"¹. The function of this brief analysis was to keep the team informed of any issues in the migration process. The results of the interim survey were subsumed into the overall results for the Post Training questionnaire.

At the conclusion of the migration process the post training questionnaire was completed by 113 (17%) of the migrating Website Administrators (including the 13 Phase 1, 2, 2a Pioneers), the results are detailed in Section B.1. At the point where the Website Administrators completed the actual migration process a second questionnaire, post migration, was provided, in total 54 (8%), responded. The results for the second questionnaire are given in Section B.2. In both questionnaires, both dichotomous (agree and disagree), multiple choice and open-ended questions were asked.

B.1 Questionnaire: Post Training.

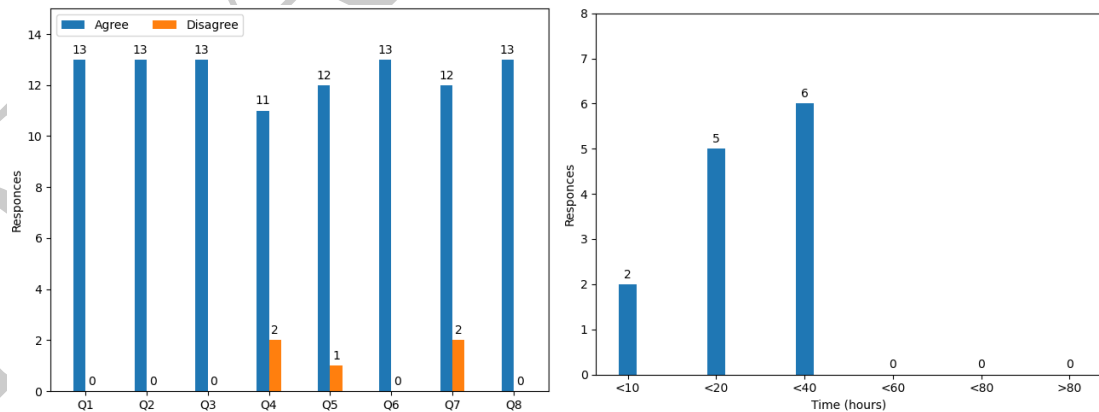
B.1.1 Results from the closed questions.

As noted above a draft version of the Post Training Questionnaire was circulated in October 2023, the initial results are given in Fig. B.1a for the eight dichotomous questions and Fig. B.1b for information regarding how long the workbook took to complete. The results at the conclusion of migration are given in Figs. B.2 and B.3. In both cases the questions for Figs. B.1a and B.2 were identical and are given in Table B.1.

¹>Knowledge and Retention>Minutes and Emails>Intro-Part.1.Feedback.04.11.23.pdf

Q1	The information I received from the I&E team and from Eventbrite about the Zoom Introduction to Training & Migration session was sufficient and satisfactory. My training workbook followed soon after.
Q2	The Zoom Introduction to Training & Migration was well-prepared and achieved the objectives.
Q3	The trainer was friendly and approachable.
Q4	Part 1 of the training workbook (learning SiteWorks) was easy to read and to follow.
Q5	The length of the Introduction and Part 1 of the training workbook was about right in order to cover the topics in it.
Q6	I was able to work at my own pace and I felt comfortable with the process.
Q7	Having completed part 1 of the training workbook I feel confident moving into part 2 that I am going to be able to plan my new <i>SiteWorks</i> site and migrate successfully.
Q8	Overall I am satisfied that the time I have spent on the Zoom Introduction to Training & Migration and the time I have spent on the training workbook so far has been well spent.

Table B.1: Questions used in the Post Training Questionnaire.



(a) Results for the questions identified in Table B.1. (b) Time to complete the initial part of the training workbook. (n = 13)

Figure B.1: Results from the draft Post Training Questionnaire issued in November 2023, these have been subsumed into the results given in Figs. B.2 and B.3

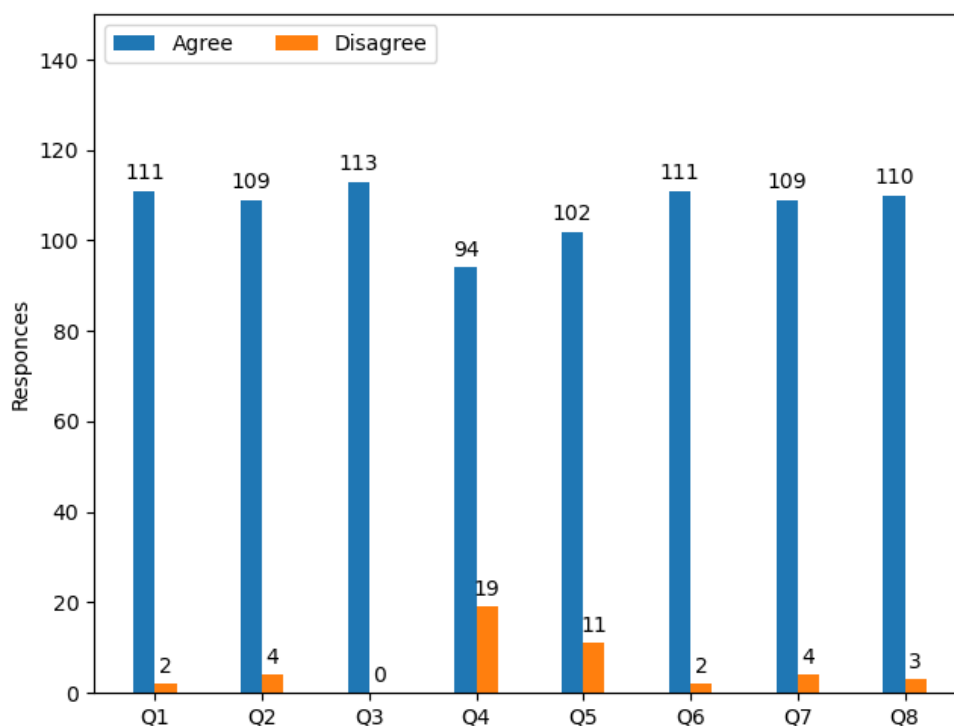


Figure B.2: Results from the Post Training Questionnaire, the key to the questions is given in Table B.1. (n = 113)

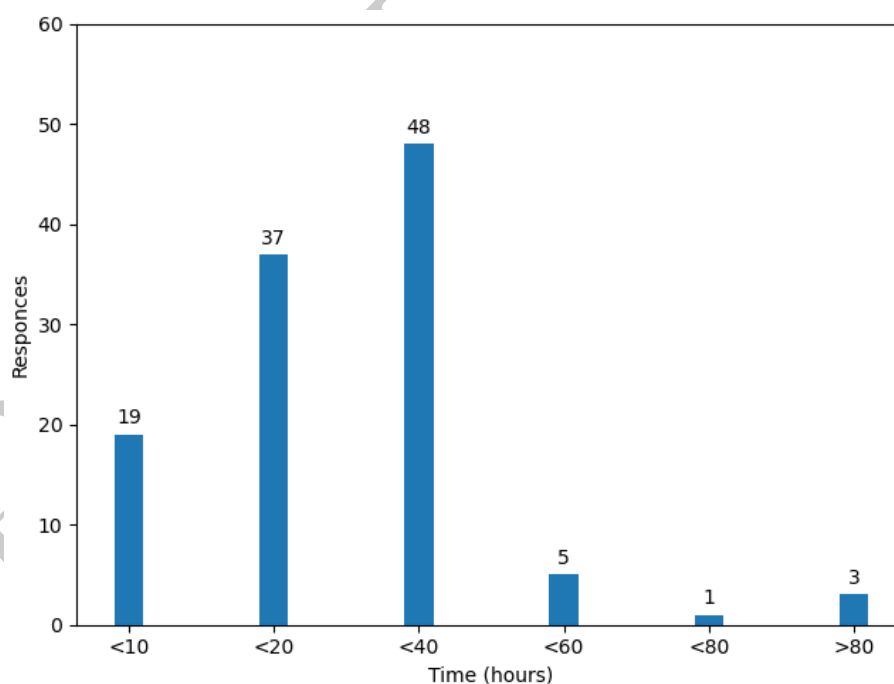


Figure B.3: The reported time spend by Website Administrators to work through the training workbook. (n = 113)

B.1.2 Open-Ended Questions

This section provides a summary of the responses given to the open-ended questions. These questions were not compulsory, so the number of responses was variable. The number of responses per question

ranged from 0 to 109, with a mean of 35. In the questions and responses, the term *session* refers to the initial zoom induction presentation, undertaken prior to the distribution of the workbook (see Fig. 2.2.1).

1. *You are welcome to add a comment about the logistics if you want to.*

Key Points: The training workbook was highly praised as well-presented, useful, and a valuable reference tool, even for users with prior *WordPress* experience. Many participants found it crucial for skill development and undertaking tasks, especially post-migration. The training session were described as clear, well-organized, and professional. The Eventbrite registration, provision of the Zoom link, and workbook delivery caused very few issues.

Challenges: Joining *Zoom* was considered difficult for some, enhanced pre-session instructions may have helped. Time commitment was a challenge, especially for volunteers, some found the process complex and time-consuming. Suggested improvements included live, hands-on demonstrations during sessions to reinforce the training.

2. *Did you experience any issues with the communication, booking process, or receipt of your workbook? If so, please explain so we can make improvements*

No summary provided

3. *What did you like best about the session?*

Key Points: The trainer was consistently described as helpful, friendly, and easy to understand. The presentation style was praised for being clear, logical, and well-structured. Many of the respondents appreciated the informal, encouraging atmosphere which reduced apprehension. Good communication from the trainer, with explanations were in plain English and avoided unnecessary technical terminology. The pace and depth of training were appropriate for a varied audience, from beginners to more experienced users. The session covered the basics effectively and broke down complex topics into manageable steps. Effective use of examples were mentioned as helpful. Some comments were raised about the quality of the Q&A session.

Impact: On leaving the session, the attendees felt more capable and less apprehensive about using *WordPress* and migrating to *SiteWorks*. The session helped attendees feel less isolated in their activities and served as a good overview of the training process and what to expect.

4. *You were clearly not impressed. Please tell us why and what we need to do better.*

Key Point: Expectation that a copy of the PowerPoint to enable easier production of an overall project plan would be provided on completion of the session.

5. *Feel free to add any comments about the trainer.*

Key Points: The trainer was described as friendly, approachable, and supportive. The participants felt comfortable asking questions. Repeatedly described as experienced, articulate, and skilled at handling diverse audiences. The presentation was praised for clarity, use of plain language, and a calm, confident delivery. The presentation was described as well-structured, clear, and pitched at an appropriate level for the audience.

Areas to Note: A number of respondents felt the Q&A lacked focus, with overly specific questions derailing the session or going unanswered due to misinterpretation. A few participants found parts of the session slow or repetitive, especially those already familiar with *WordPress* and *SiteWorks*.

6. *What could the trainer have done better?*

No summary provided

7. *What did you like best about the workbook so far?*

Key Points: The workbook was clear, well organised, and non-technical, making it accessible to users with varied levels of experience. Instructions were easy to follow, even for beginners. The logical progression and step-by-step guidance built users' understanding and confidence. The large number of screenshots made the material more understandable. Users liked the "read then try" approach, with tasks allowing hands-on practice. Examples and self-checks after tasks helped reinforce training. Many intend to use the workbook as an ongoing reference during website setup and migration. The format allowed for self-paced training and was usable alongside the demo site.

8. *What didn't you like? What needs to be improved?*

Key Points: The length was off-putting for some, especially those who prefer concise material. Better highlighting of optional or advanced content (e.g. "Posts"). Some sections (e.g. "Posts", "Import", or early background info) were felt to be too advanced or not relevant for most users. Better suited to be in an appendix. Occasionally screenshots didn't always match the demonstration site or the current *WordPress* implementation.

Suggestions for Improvements: Use of coloured panels or boxed paragraphs to highlight key points. Some found the language too technical for non-IT users and preferred step-by-step bullet points over narrative explanations. Dyslexic and visual learners appeared to struggle with text-heavy sections and preferred videos or diagrams. A short, action-focused version of the workbook. Some users wanted more video-based training or visual aids like flowcharts.

9. *Please comment about the length of the workbook if you want to.*

Key Points: While the workbook was widely recognized as comprehensive, well-structured, and necessary in length, many found its 170+ pages initially daunting. But it was noted the graphics and screenshots were helpful and accounted for much of the length. To some the length was intimidating, leading to a feeling of being overwhelmed before starting.

Suggestions for Improvement: Shorten introductory content and separate *SiteWorks* and *WordPress* sections for clarity. Use more numbered steps and less narrative text for action-oriented users. Improve clarity and consistency of examples, especially for complex tasks like adding posts to group pages.

10. *Was it too long or too short?*

Key Points: The main concern in this set of comments was the excessive length and verbosity, especially in the introductory sections. Some sections (like advanced features or post/query loops) were seen as non-essential and skipped by users focused on core functionality. However, those already familiar with the subject matter preferred to dive into hands-on content more quickly.

Suggestions for Improvements: Shorten the introduction and reduce narrative content. Use bullet points or step-by-step lists to simplify instructions. Consider offering a separate "quick start" or abbreviated how-to guide for more advanced users.

11. *Please comment about the working pace and your level of comfort if you want to.*

Key Points: The majority of users appreciated the self-paced nature of the workbook, which allowed them to work through the material according to their own schedules, experience levels, and personal commitments. While a few felt time pressures (internal or external), most found the training process flexible and manageable. The approach taken was acceptable for people with different backgrounds.

Challenges and Possible Improvements: Initial time pressure (real or perceived) caused stress for some users, especially those juggling other commitments. Technical issues (e.g., trouble installing *LocalWP* caused delays.

12. *What was wrong with the timing and/or why did you not feel comfortable?*

No summary provided

13. *Please comment about your confidence moving into part 2 if you would like to.*

Key Points: Most users were ready and confident to proceed with Part 2, with many already having completed or begun migration. While a few still feel uncertain in specific areas, they know where to find help and value the workbook as a go-to resource. A small number expressed nervousness or uncertainty, but this was often balanced by curiosity and a desire to learn. Strong sense of readiness among pioneers and those with prior *WordPress* or *SiteWorks* experience. Several users noted that practising *LocalWP* helped build their confidence.

Reported Issues: Some users feel less confident with specific tasks, especially, Creating and managing posts Understanding event categories or duplication Making aesthetically pleasing page designs

14. *Why do you have reservations about being able to move forward?*

No summary provided

15. *Please comment about your level of satisfaction if you would like to.*

Key Points: The majority of users were very satisfied with the training process. Many felt it was worth the time invested and appreciated the systematic, structured approach. Most users reported increased confidence in using *WordPress*, especially for basic tasks.

16. *Why do you not feel your time was well spent?*

No summary provided

17. *If you would like to add any general comments about your initial training programme to date then please do so here.*

Key Points: Highly positive overall: Many participants appreciated the workbook, training resources, and support received. The efforts of volunteers, trainers, and developers were widely praised. Self-paced format appreciated with no fixed deadlines, reduced pressure. A number of participants noted it was more time-consuming than expected. A few expressed concern that their local u3a may not fully utilise the new website or appreciate the work done.

Suggestions for Improvements: Some users wanted a shorter, simpler version, especially for non-technical or time-limited users. Parts of the workbook (especially the section on Posts and Gutenslider) were confusing or over technical. Some suggested proactively following up with learners after a couple of weeks to offer support and keep momentum.

B.2 Questionnaire: Post Migration

B.2.1 Results from the closed questions.

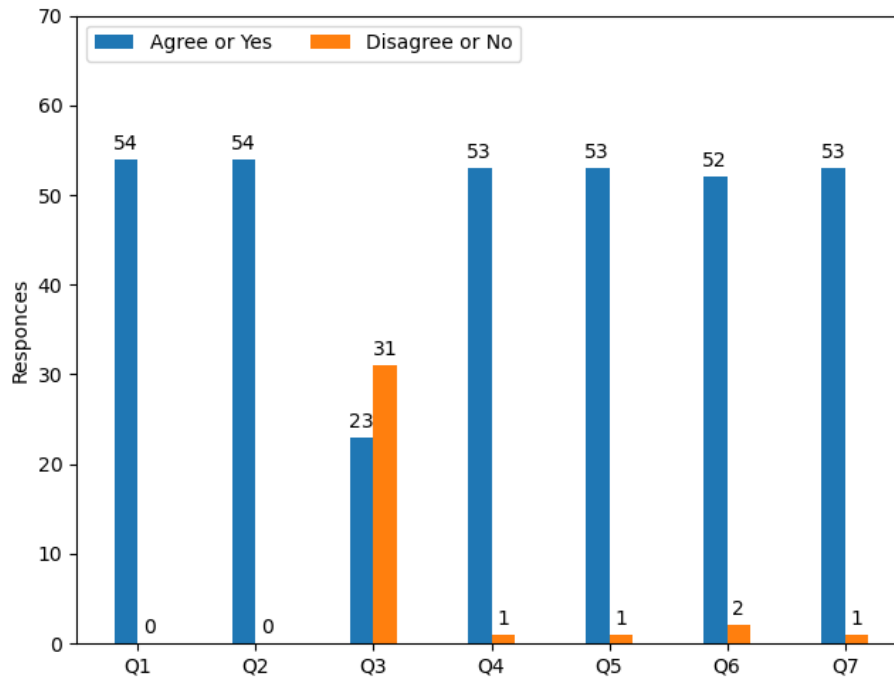


Figure B.4: Results from the post migration questionnaire, the questions are given in Table B.2. (n = 54)

Q1	When you finished Part 1 of the training workbook (Learning SiteWorks) you flagged that you were ready for a Migrator to progress to Part 2. Depending on the queue workflow you might have had to wait.
Q2	I was able to plan my new site using <i>LocalWP</i> using my <i>Site Builder</i> extract (where applicable) or create my new site from scratch.
Q3	Did you need help from your Migrator while you were site planning?
Q4	My new <i>SiteWorks</i> site was set up as I wanted with the correct URL, Admin name/logon, etc. and I was able to choose my Home page.
Q5	I worked at my own pace during both site planning and migration and did not feel pressurised at any time.
Q6	I am satisfied with the Migrator who worked with me.
Q7	I am satisfied with the <i>SiteWorks</i> site that I have created for my u3a and feel confident about editing and maintaining it in the future.

Table B.2: Questions from the post migration questionnaire

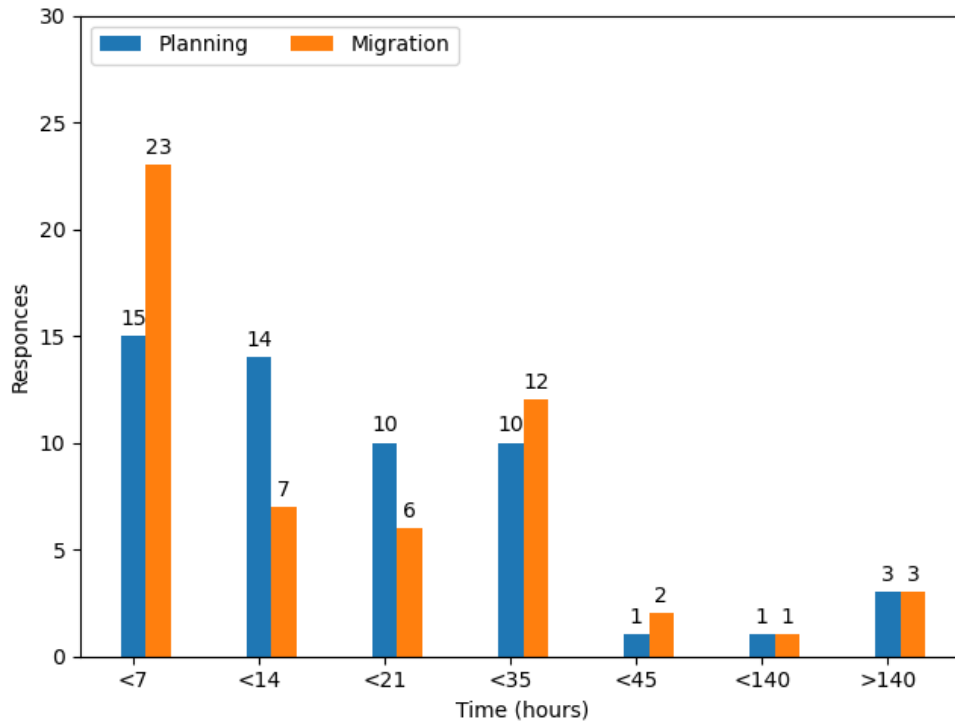


Figure B.5: Results from the post migration questionnaire, in response to (a) How long did you spend in the site planning stage of the process? Please choose from one of the options below (where 7 hours is equivalent of one day). and (b) "How long did you spend in the migration stage of the process? Please choose from one of the options below (where 7 hours is equivalent of one day)." (n = 54)

B.2.2 Open-Ended Questions

This section provides a summary of the responses given to the qualitative questions. These questions were not compulsory, so the number of responses was variable. The number of responses per question ranged from 0 to 40, with a mean of 17. If very few responses were returned (typically < 5), no analysis was undertaken, these are identified with "No summary provided".

1. *Comment on the Part 1 to Part 2 wait time if you wish to do so.*

Key Points: Migrator response times were reported to be rapid, often within hours. The majority expressed satisfaction or surprise at the speed. One response mentioned a missed email due to it being blocked, not due to slow response.

2. *How long did you wait versus your expectation?*

No summary provided

3. *Comments on your site planning if you wish to do so.*

Key Points: A range of planning approaches were reported. While many found the *Site Builder* extract and workbook useful, others preferred a direct approach. Most realised the value in experimenting early and evolving their site post-migration, with flexibility and access to examples being key aids. Reviewing other sites and discussions with migrators was seen as useful.

Approches Adopted: The use of the *Site Builder* extract, while appreciated was not used by many. In general a complete redesign was undertaken, either in *LocalWP* or directly top the production site. Several users used the SiteBuilder extract as a base, then edited or rebuilt content to suit the new format.

4. *What went wrong? Why could you not plan your site?*

No summary provided5. *Comment on the site set up if you wish to do so.*

Key Points: The migration and setup process was widely regarded as intuitive and effective, with most users feeling empowered to manage and refine their sites with little difficulty. Some responses noted only limited engagement with other committee members within an individual u3a.

6. *What went wrong with the site set up?***No summary provided**7. *Comment on the working pace if you wish to do so.*

Key Points The migration process was largely self-paced and adaptable, with minimal external pressure. While Website Administrators found it time-intensive or faced delays due to personal or organizational factors, most appreciated the flexibility and support provided, particularly by responsive migrators. A few users felt internal pressure to keep going or were motivated by the *Site Builder* cut-off date.

Approaches Taken Many users worked on the process at their own pace, often fitting it around holidays, other commitments, or life events like moving house. Migrators were described as responsive, supportive, and not pushy. Some users appreciated occasional check-ins to help maintain momentum.

8. *Why did you feel under pressure?***No summary provided**9. *Comment about your Migrator if you wish to do so*

Key Points Migrator support was overwhelmingly positive, with users valuing the quick, helpful, and friendly assistance. A few encountered gaps in support but generally found strong backup when needed. The support played a key role in helping users feel confident throughout the migration process.

10. *Why are you not confident about editing and maintaining your site in the future? What can we do to make this better for you?***No summary provided**11. *Please add any further comments about your SiteWorks training and migration programme if you wish to do so.*

Key Points: Most users found the process easier than expected, especially once they began using the demo or production site. Many praised the structure of the training, including the workbook, Zoom sessions, demonstration site, and support team. As noted earlier a number of respondents were initially daunted or overwhelmed, particularly by the size and detail of the workbook, but their confidence grew with practice.

Suggestions for Future Activities: Suggestions included consolidating instructions, reducing duplication, and clearer guidance on features like sub-menus, events, SEO, and contact forms. *WordPress* and *SiteWorks* was seen by some as unintuitive compared to *Site Builder*, especially for repetitive tasks like editing groups or creating events. Provide simplified/terse guidance for reluctant webmasters. Include better coverage of modern website expectations (e.g., payments, mobile usability, discoverability/SEO). Improve the guidance on certain *WordPress*-specific tasks and layout customisations (e.g., menus, footers, forms).

Technical Considerations: Features like footer editing, sub-menu creation, and group formatting were noted as tricky or lacking documentation. There was a call for guidance on modern needs, like membership forms, payment integration and GDPR compliance.

DRAFT: V.0.2a

Appendix C

Team Leaders and Migrators Questionnaire.

The survey was designed to capture comments from the core team shortly after the completion of the migration process and the transition to Business as Usual. The survey was issued on the 14th February 2025.

All team leaders and those involved in migration were supplied with a link to the feedback survey. Of the 41 requests issued, seven responses were received, giving a response rate of 17%.

The survey was split into sections: Training and Resources, Team Interaction, Project Management, Outcome and Impact and Personal Insights.

Each section contained open-ended questions, or the consideration of a 1-10 point Likert scale. The scale used was 1 for *strongly disagree* through to 10 *strongly agree* and are plotted as conventional statistical boxplot¹, Fig C.1. A return of zero indicate that the question was not considered applicable by the respondent, these were discounted in the computation of the results.

C.1 Training and Resources

This section contain four likert scale questions and two open-ended text questions.

ID	Question	Max	Min	Mean	Median
H	The objectives of the project were made clear to me at the start of my involvement with the project.	10	3	6.2	8
I	My role in the project was clearly defined at the start of my involvement in the project.	10	1	5.14	5
J	I was given the correct tools and training to fulfil my role.	10	1	4.8	4
K	The use of Microsoft Teams greatly assisted the project.	10	3	5.28	5

Table C.1: Responses for Training and Resources question, see Fig C.1a.

Summary of the points raised in the open-ended question:

Key Points: Lack of training in both MS Teams (which was promised) and OpenProject, a lot of on the job training and self paced effort was required. The Trust volunteer training was very generic, and its relevance was questioned. Lack of a formal plan hindered a formal monitoring processes.

¹A boxplot displays the distribution of a dataset: minimum, first quartile (Q1), median, third quartile (Q3), and maximum. Additionally outliers are shown if they fall significantly outside the dataset.

C.2 Team Interaction

ID	Question	Max	Min	Mean	Median
N	Communication within the team was exceptional.	10	5	7.48	8
O	Communication between the team and TAT was exceptional.	5	1	2.8	3
P	Communication between the Team and individual u3as was exceptional.	9	3	5.8	6

Table C.2: Responses for Team Interaction survey question, see Fig C.1b.

Summary of the points raised in the open-ended questions:

Key Points Communication between the TAT and the team was very poor, characterised by delays and lack of engagement. The lack of engagement led directly to the resignation of the Communication Lead in April/May 2024. The communication from the team to individual Website Administrators regarding T&C was highly satisfactory after it was taken over from TAT. Responses times from individual u3a was variable.

It was noted that TAT showed little trust in the project team, given the scope of the project and its impact on the total membership, issues such as lacking access to local committee contact details caused issues, and a degree of frustration².

C.3 Project Management

ID	Question	Max	Min	Mean	Median
R	Project planning met my expectations.	10	2	6.0	5
S	TAT fully supported this project.	6	1	3.3	3
T	The management of the project by the team leaders met my expectations.	10	4	7.3	8

Table C.3: Responses for Project Management survey question, see Fig. C.1c

Summary of the points raised in the open-ended questions:

Key Points It was clear that certain members of team assumed responsibly to push the project forward to its overall benefit. Lack of strong project and ownership leadership from TAT. Very little formal planning within the project .General agreement that the weekly meeting were worthwhile and kept the project on track, but occasionally items were subject excessive repetition, leading to a degree of friction.

Points to Consider: TAT involvement led to delays, in particular associated with T&Cs. TAT could have helped u3a buy into the project. The TAT portal was problematic and led to significant problems with some individual u3a confirming acceptance of their T&C. The apparent lack of interest from TAT in a major project was disappointing, to get anything published was extremely difficult given that over 70% of the total u3a membership would be impacted.

C.4 Outcome and Impact

There were no numeric questions in this section, Summary of the points raised in the open-ended questions are as follows:

Key Points: Migrating 600 sites is a year and delivering a stable high quality product. Maintain the documentation and software to the highest possible standards. Noting that the project is volunteer led was viewed with considerable satisfaction.

²See page 2 & 3 of >Knowledge and Retention>Minutes and Emails>Implementation_Review_31.12.24

C.5 Personal Insights

ID	Question	Max	Min	Mean	Median
AA	My experience working on <i>SiteWorks</i> was a rewarding experience.	10	5	8	8
AB	Did your involvement fully draw on your experience and professional skills.	10	6	8.71	9

Table C.4: Responses for Personal Insights survey questions, see Fig C.1d.

Key Points: Interacting with a team of like minded volunteers who were determined to make the project a success. Delivering a stable high quality product to many u3as.

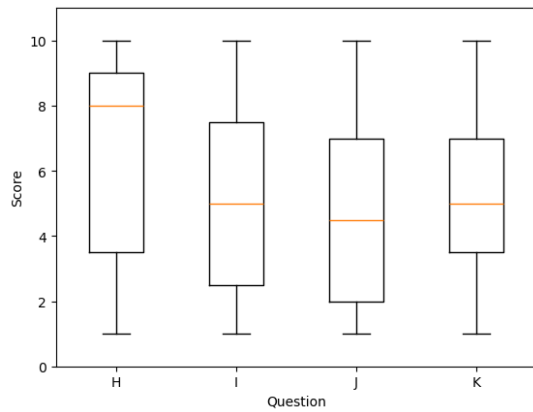
Challenges Keeping going when others showed a degree of apathy and lack of interest making the project's progress problematic. Progress was also not aided by the slow decision making process of TAT.

Communicating to web managers on the use of *WordPress* and *SiteWorks* and referring them to the excellent training materials produced by the team led to some highly repetitive activities.

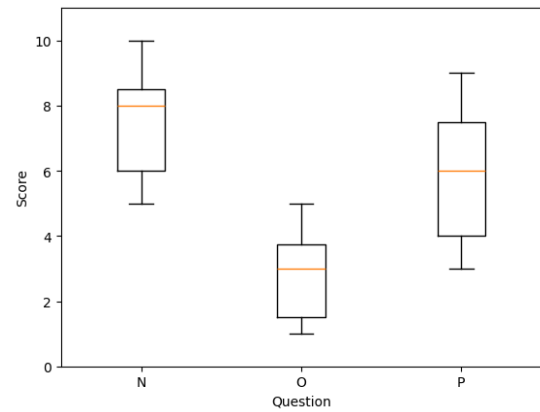
C.6 Final Comments

Response to *Is there anything else you would like to share about your experience?*

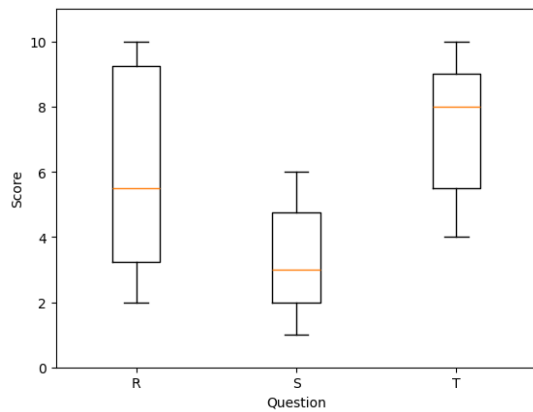
Key Points Overall the majority were glad that they became involved and it showed that a few determined people can win through with encouragement and mutual support.



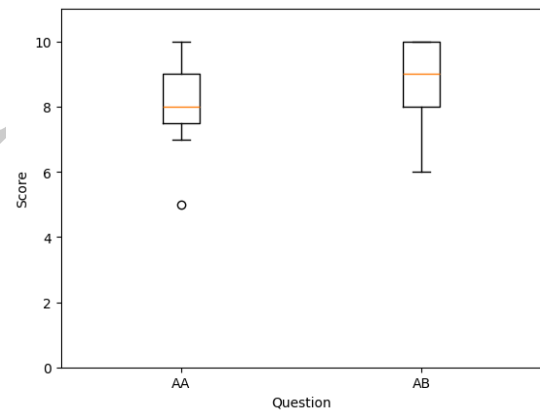
(a) Boxplot for Training and Resources questions



(b) Boxplot for Team Interaction questions



(c) Boxplot for Project management questions



(d) Boxplot for Personal Insights questions

Figure C.1: Results for the questions in the Team Leaders and Migrators Questionnaire.

Appendix D

Web Managers Questionnaire

All u3a Website Administrators registered with the *SiteWorks* team were given the opportunity to comment on their *SiteWorks* experience and expectations through a web based questionnaire.

While the questionnaire allowed multiple members of a u3a to respond, in the analysis a unique u3a was identified by having a respondent who was a website administrator and had a number of members that exceeded zero. This did exclude two Networks - this was confirmed by the analysis of the free text responses. It is highly probable that information was received from 328 individual u3as.

The questionnaire was divided into a number of sections as follows:

Context: Information regarding the u3a and the responder were captured.

Migration: This optional section allowed those respondents who had been through the migration process to reflect on the process.

Your Current *SiteWorks* Website: A number of question regarding the impact and use of the website.

Usability: Captures the individual users experience in a number of standard activities, and their ability to use the provided documentation or forum.

Plugins: Optional section for these Website Administrators who has added third party plugins to their site.

Statistics: Information regarding the website's size and usage.

Observations: A open-ended section where any further observations could be added.

D.1 Context

The questionnaire, delivered using *Google Forms* was opened on 29 May 2025 and closed on 27 June 2025. Reminders were sent on **. Of the approximately 1000 requests sent, 404 responses were received, giving a response rate was 40%, Table 3.1.

Number of responses	404
Web Managers	339 (84.3%)
Assistant Web Managers	55 (13.7%)
Group Leaders etc..	8 (2.0%)
Individual u3a Websites identified	339
Total Membership across u3as	146,149

Table D.1: Summary of the responses received.

The role of respondents and their technical skills are shown in Fig. D.1, which are divided into four levels.

Level 1 No previous website experience.

Level 2 Have maintained content on a non-u3a websites.

Level 3 Have set up a websites from scratch

Level 4 Familiar with technologies underlying a website (e.g. PHP, CSS etc.)

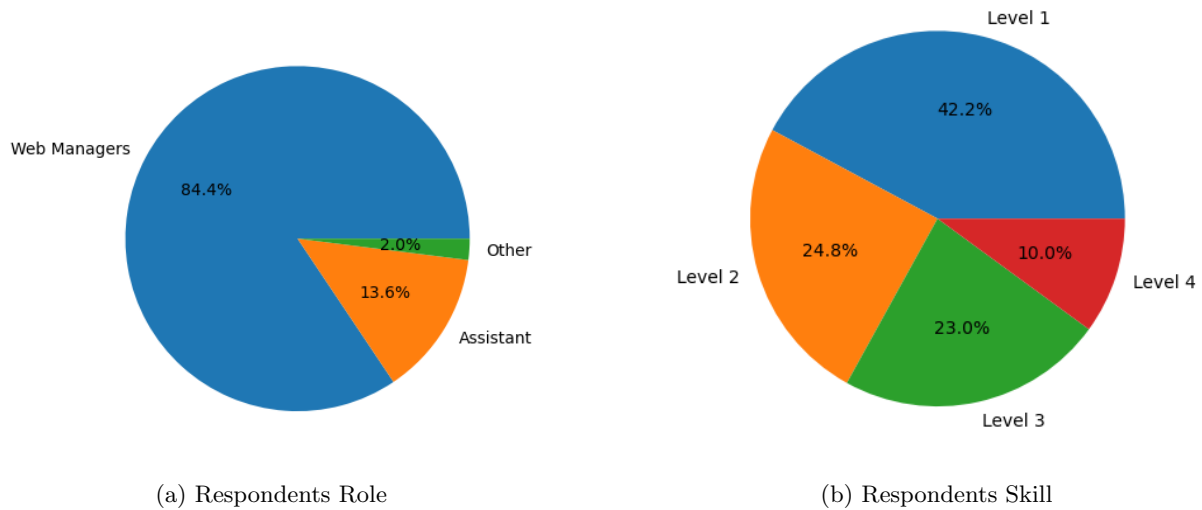


Figure D.1: Overview of the respondents' role and initial skills.

Fig D.2 shows the membership numbers of the u3a responding, u3a sizes ranged from under 20 to over 3500, with a mean of 438 and a median of 325.

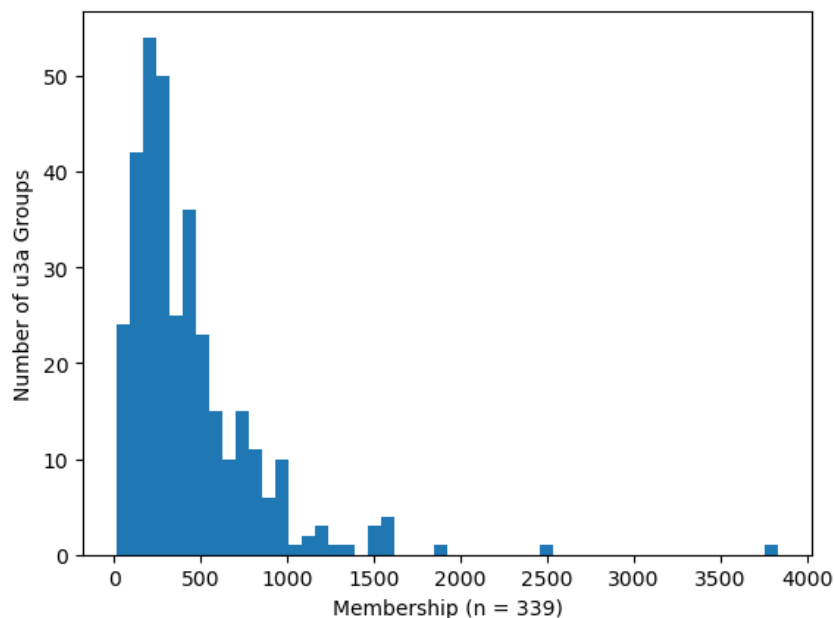


Figure D.2: Reported sizes of the u3as whose Web Manager respond to the questionnaire.

The number of u3as who also use Beacon, with and without the member portal being activated is shown in Fig. D.3, over 70% reported using *Beacon*.

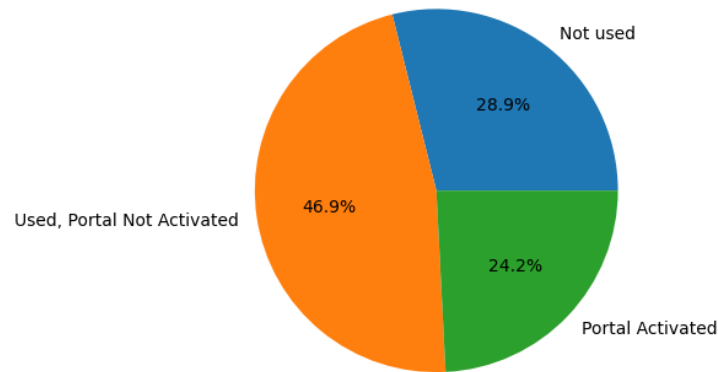


Figure D.3: Use of Beacon as reported by web managers with their u3a.

The final question in this section identified how information was disseminated to members within the u3a, Fig D.4. A number for open-ended responses shown a wide range of other approaches.

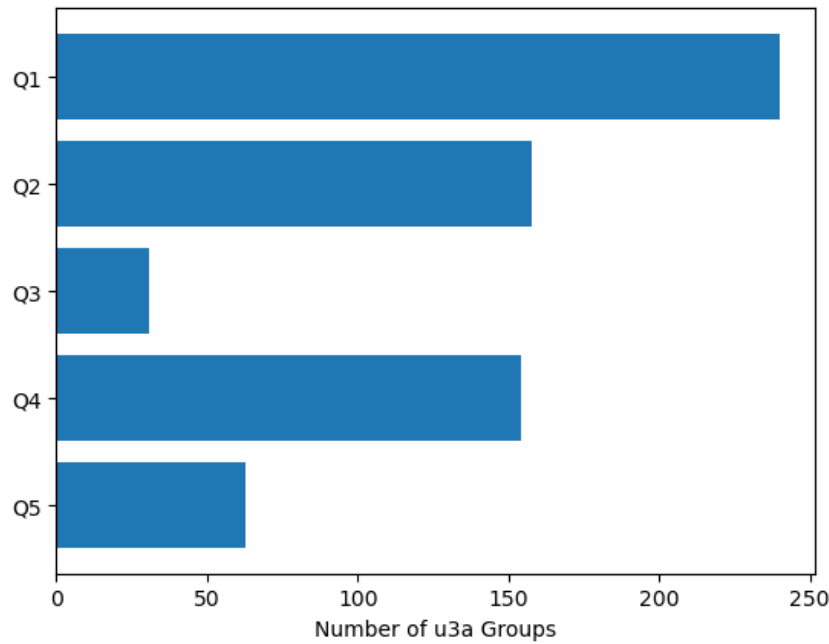


Figure D.4: Main method of disseminating information within an individual u3a.

Q1	Emails via Beacon or similar system
Q2	Newsletter distributed as a <i>Beacon</i> (or similar) attachment
Q3	Newsletter distributed solely via the website
Q4	Notices or posts on the website
Q5	Printed material

Table D.2: Key for Figure D.4

Other approaches for dissemination noted included:

- Printed Newsletters/Magazines for members without internet/email access.

- Websites updated with newsletter content, events, and activity information often based on member contributions and leader updates.
- Social Media including Facebook (private pages, group-specific posts) with WhatsApp being used by groups within a u3a.
- Meetings and verbal updates at regular meetings, notice boards, posters were considered important for members without digital access.
- Regional/local newspapers used for wider announcements.

D.2 Migration

An optional section was provided regarding the migration process, 328 (81.6%) responded. The responses to the four Likert based questions are presented in Fig D.5. The reported times to migrate are shown in Fig. D.6.

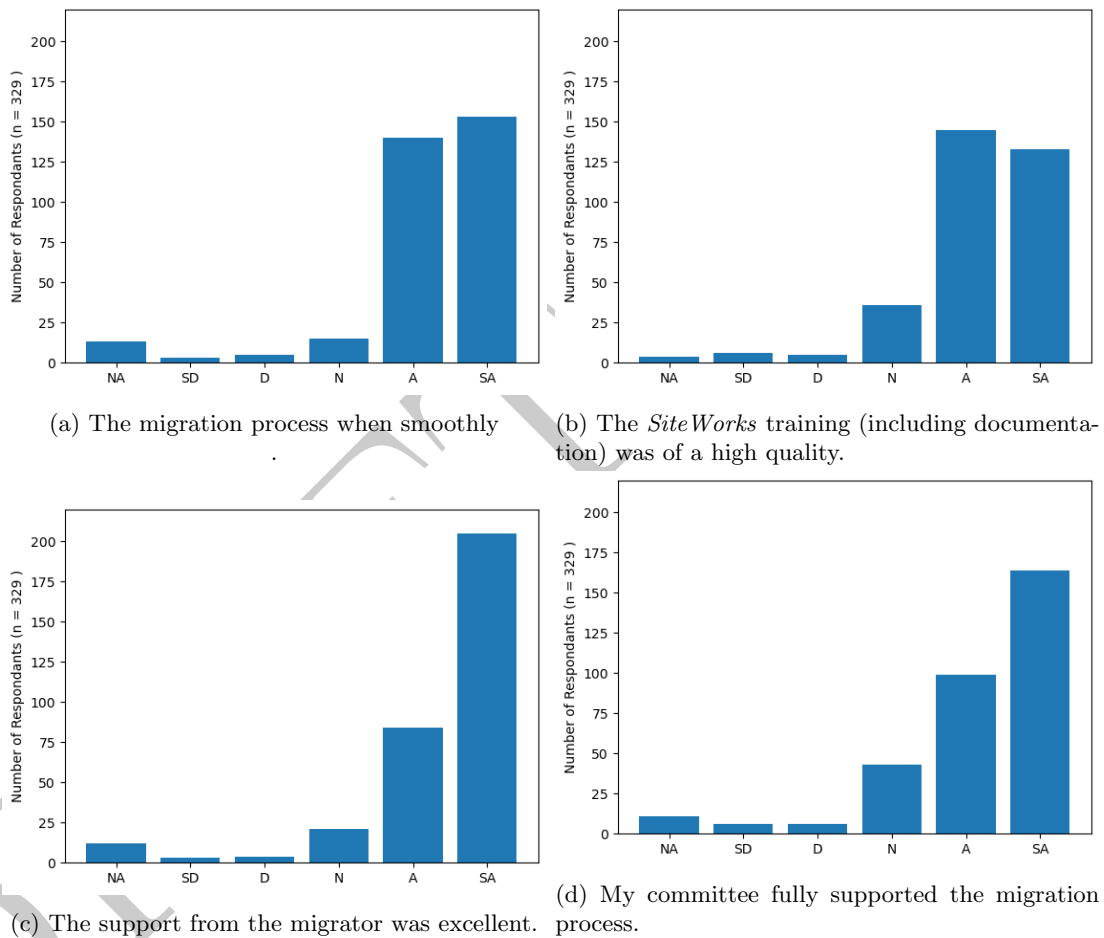


Figure D.5: Responses to the questions regarding the migration process.

Additional Migration Comments

Of the 328 respondents involved in migration 174 (53%) provided additional comments, which are summarised below:

Key Points The majority of the respondents were satisfied with the final result and thanked the *SiteWorks* team and mentors for their support.

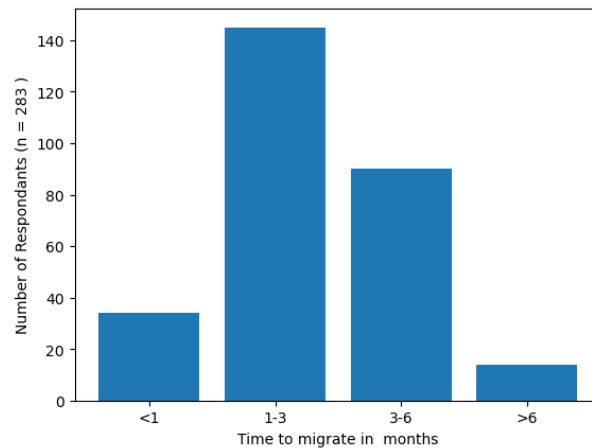


Figure D.6: Reported Migration time by Website Administrators.

Training & Documentation A number found the training material overwhelming, overly detailed, and difficult to navigate. Several respondents suggested a need for a “quick start guide” especially for those who had IT experience. A number of u3as found the documentation ineffective for internal use and have written their own guides.

Migration Process The majority of those involved in the process reported that the actual migration as smooth and well-supported. Many web administrators were delayed due to personal circumstances committee delays, or limited availability of volunteers.

Learning Curve Steep, especially for complete novices, *WordPress* and *SiteWorks* presented a significant challenge. Those with IT or *WordPress* experience generally found the process easier. Practice tools helped, the use of *LocalWP* for practice was frequently mentioned as beneficial.

Delays & Timing Limited time and reliance on small teams or single volunteers often caused delays. Internal approval processes and waiting for committee decisions slowed some migrations. Early adopters face some more challenges as early users of the system.

Other Points Not all users migrated their *Site Builder* website, some opted to start with a clean site. Reported issues with specific tools (e.g. installing *LocalWP* on Apple machines), or low image quality post-migration.

D.3 Your Current *SiteWorks* Website

The main question in this section was “What does your u3a use the website for. Please select all that apply.” The responses are summarised in Figure D.7, against the six options given in Table D.3, in addition open-ended response was available for “other” uses:

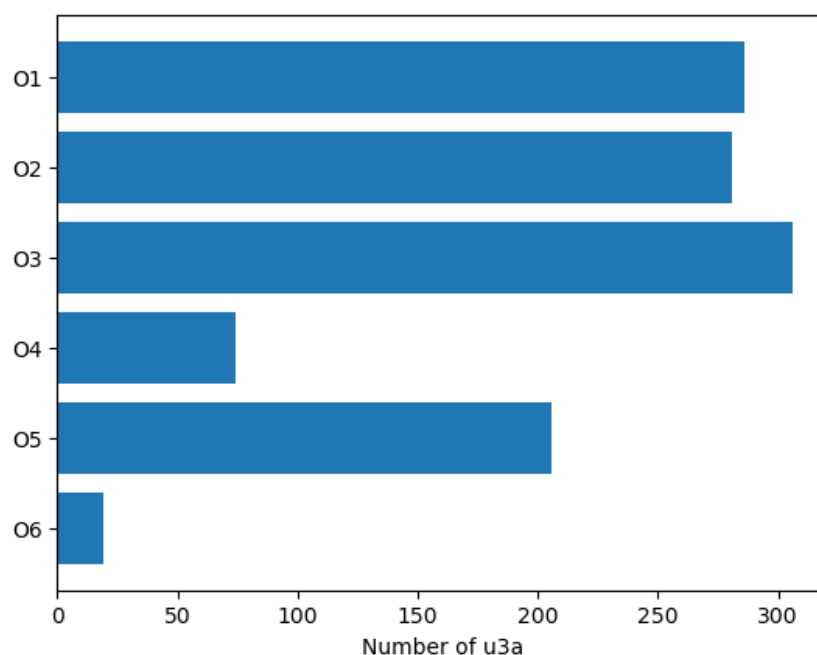


Figure D.7: Responses to: *The use that the website is put to..* as listed in Table D.3

O1	Recruiting new members.
O2	Ensuring your u3a has an online presence in the local community.
O3	Informing current members of forthcoming events.
O4	Rapid communication of updates (e.g. meetings cancelled) to members
O5	Provide current and future members with information.
O6	Sole method of distributing a regular Newsletter.

Table D.3: Key to the options shown in Fig D.7

The optional free text comments are summarised as follows:

Information & Document Access Centralised repository for key documents including constitution, minutes, newsletters, policies, procedures, annual reports.

Group & Event Management Each group have their own page with up-to-date information (activities, meeting times, booking). Enable group leaders to update their pages. Promote group activities, outings, and events with online application/booking options. Provide information to help members decide whether to join a group.

Communication to members Newsletter distribution (digital and limited printed versions). Contact forms for committee and group leaders. Notify members about updates and events. Dissemination of training material and news items.

Membership Management Promote u3a ethos and benefits. Online membership renewal via *Beacon* and *PayPal*. Provide links for renewals and related actions.

Visibility & Promotion Improve website visibility and SEO (currently poor). Promote connections with u3a Scotland, u3a UK, and local organisations. Increase appeal and usage of the website among members (especially those who rarely visit). Attract new members (currently reliant on word-of-mouth).

Miscellaneous: Maintain image galleries and archives. Provide a one-stop source for members, group leaders, trustees, and event planners. Serve both current and potential members.

The second question addressed various aspects of *Regarding your own website* and considered a number of issues including the technology, security, content and feedback from members. the responses are given in Fig D.9. Finally information on updating is provided in Fig. D.8.

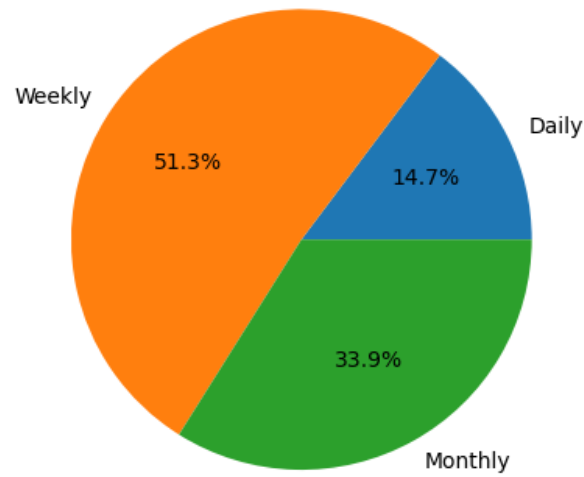
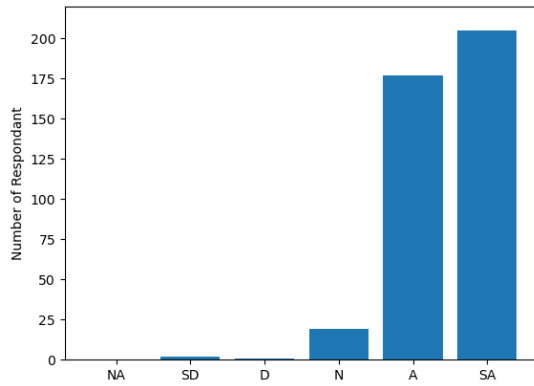


Figure D.8: Responses regarding the regularity of updating of the individual website.

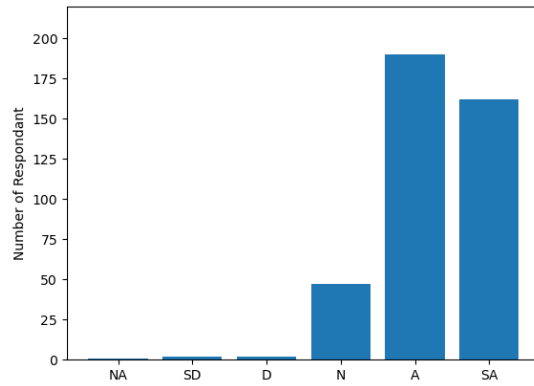
D.4 Usability

The usability section was aimed to gain an indication of the key editing challenges that **all** respondents to the survey had, the response were against, *I am confident with using the following WordPress and SiteWorks features*: Fig D.10

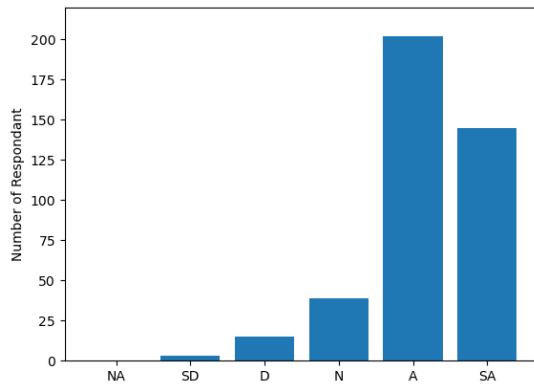
response num
ure captions



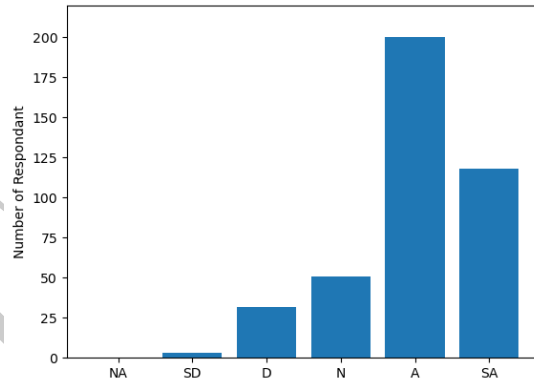
(a) I have confidence in the Website as it is based on proven technology.



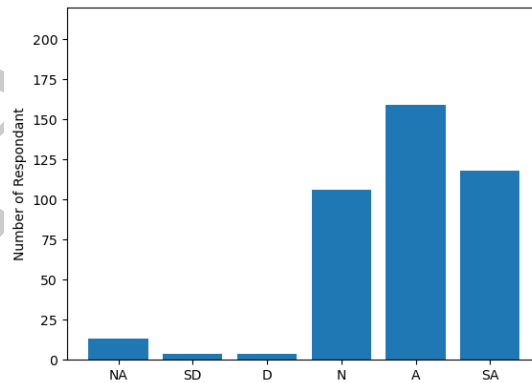
(b) I am confident with the backup and security features provided by SiteWorks



(c) Editing content is straight forward.



(d) *SiteWorks* provides all the features my u3a requires.



(e) The feedback from members has been extremely positive.

Figure D.9: The responses to five aspects of "Regarding your *SiteWorks* site"

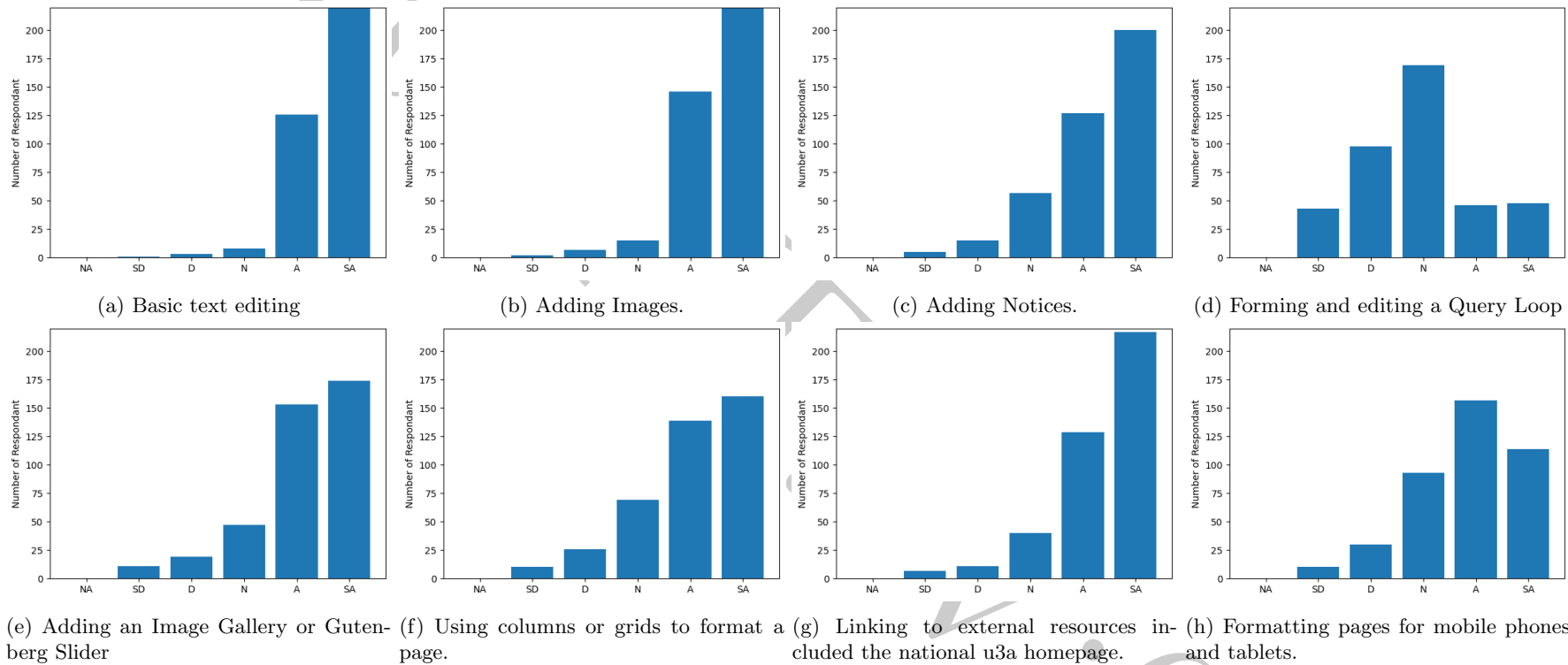


Figure D.10: Responses to *I am confident with using the following WordPress and SiteWorks features:* for eight basic editing and formatting activities

Responses to What features, if any, do you consider missing from SiteWorks?

General Feedback: Many users felt no features were missing, Several preferred to keep the system simple and indicated that existing plugins or workarounds were sufficient.

Access & User Roles Track who made updates and when, Ability for assistants/editors to have controlled access. Multiple authors or joint group leaders. Member-only access to documents and pages.

Forms & Data Entry Online/HTML forms or form builder for membership applications, Event bookings and contact submissions.

Events & Calendar Monthly view calendar, Ability to duplicate events easily, Better event management: Event summary block, ticketing and wait lists, Visibility controls for group-specific events, Event sorting and improved display order.

Design & Formatting Customisable tables (formatting, reordering, Excel-like features), Drop-down menus from main navigation menu, Change order and padding of text/media blocks, More styling options (fonts, image captions, accessibility), "New"/"Urgent" stickers or visual highlights.

Media Library Better media organisation: Tagging, categorisation, subfolders, Easier image-to-page linking, Media library search improvements, Privacy for media on private pages, Display controls for image sizes Audio and video support (with embed options).

Technical Enhancements Integration with *Beacon*, especially for: Groups, Contacts and Membership data, synchronisation between *SiteWorks* and *Beacon* records to reduce duplication. Additionally back button functionality that returns to scroll position, usage stats and content audit tools were requested.

Communication & Notifications Attachments to contact form emails, Member subscription to notices/news updates. Email alerts for new content

Payments Online payments and payment gateways (e.g. Stripe, GoCardless), integration with forms for event/membership fees

Training & Usability Simple, visual guides or quick reference sheets. Fewer clicks and simplified workflows. Improved help suggestions and visual clarity (e.g. font size, contrast).

D.5 Information Resources

The SiteWorks team has provided a number of information resources to support Website Administrators Fig D.11, it shows that both the User Guide and the FAQs are the main information resources, both accessible from the main *SiteWork* site. The WordPress Development Forum can be considered a special case as it requires registration¹ and is considered to be more technical than the majority of users require.

¹ (u3awpdev.org.uk)

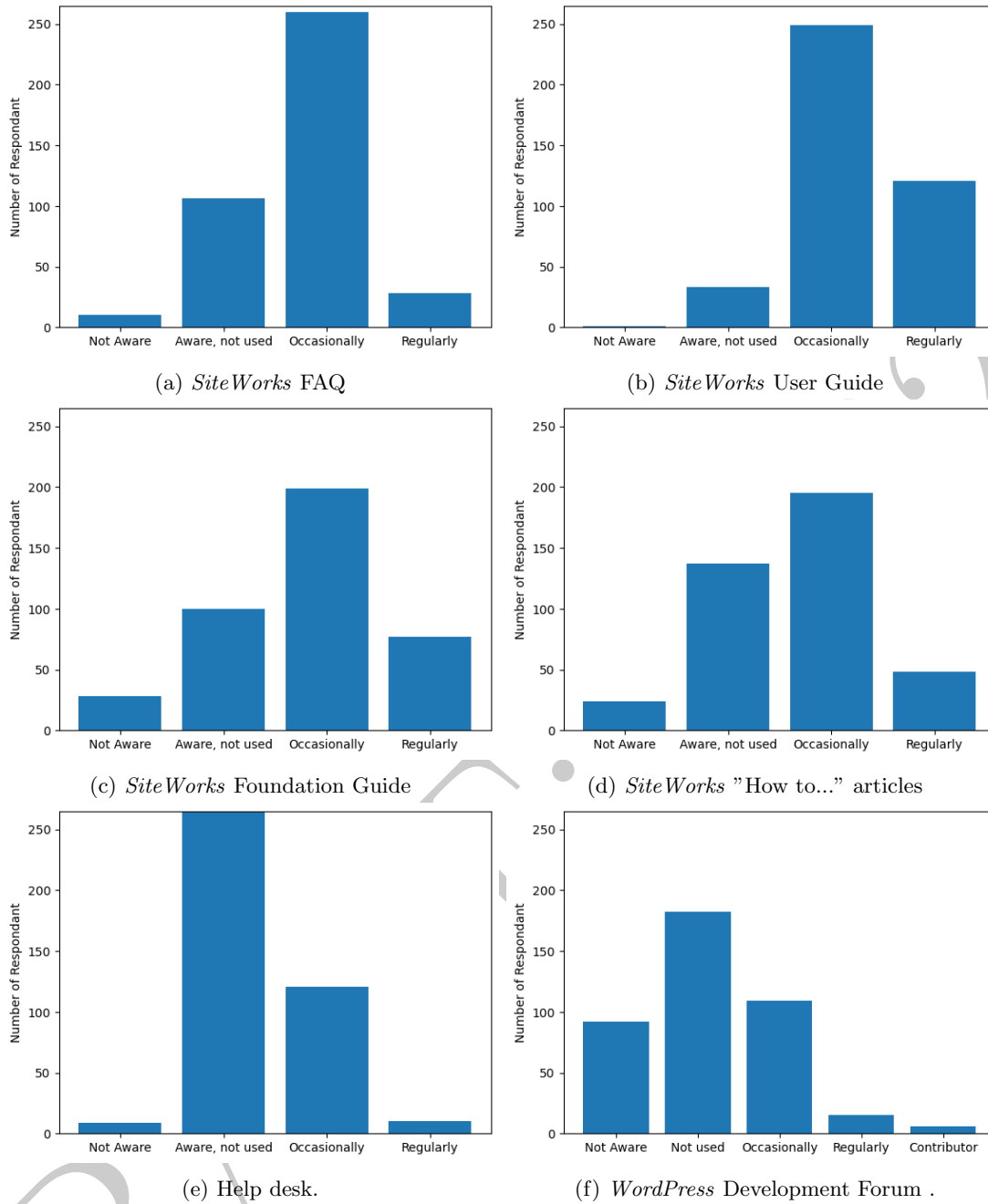
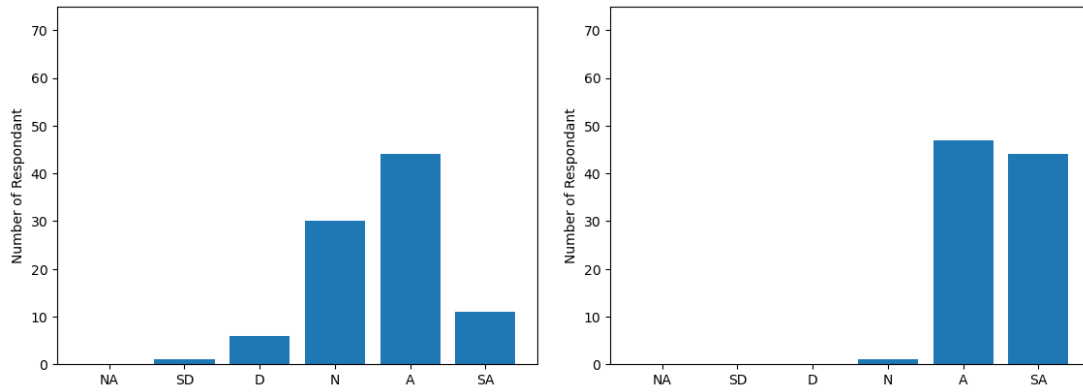


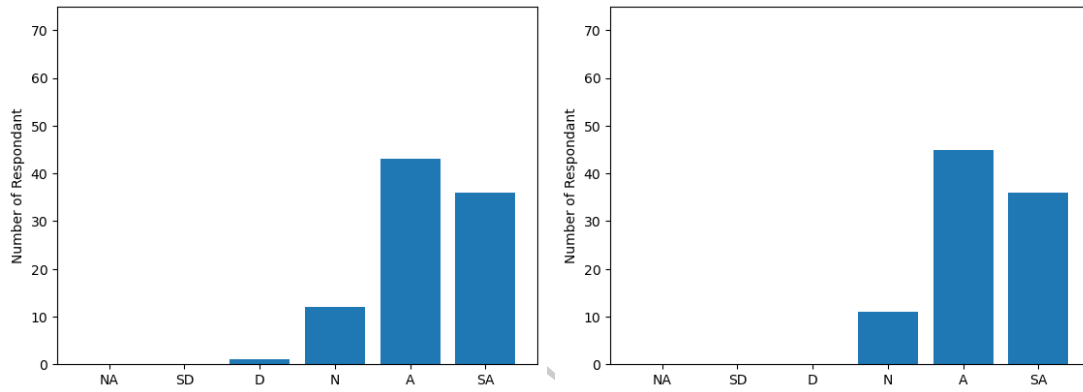
Figure D.11: Responses to "Which of the following information sources have you used from the *SiteWorks* website"

D.6 Plugins

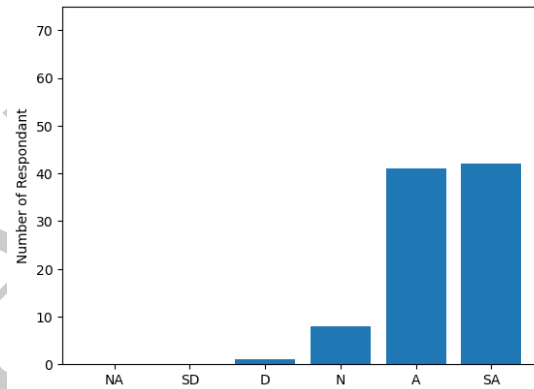
Of the 402 respondents, 82 (20%) indicated that they had used plugins. The reason for adding, installing and using these third-part additions are given in Fig. D.12. In Figure D.13, the broad functions of the installed plugins are given. A full list of those installed across all u3as is given in Appendix E.



(a) I added new plugins as the *SiteWorks* product as delivered does not meet my u3as requirement. (b) I am aware of the possible risk of adding additional plugins to SiteWorks.



(c) The process of installation, and configuring an additional plug in is straightforward (d) It is important for succession planning that the addition of a third party plugin is well documented.



(e) I would like the SiteWork team to recommend suitable plugins

Figure D.12: Responses to the questions regarding plugins , (n = 82)

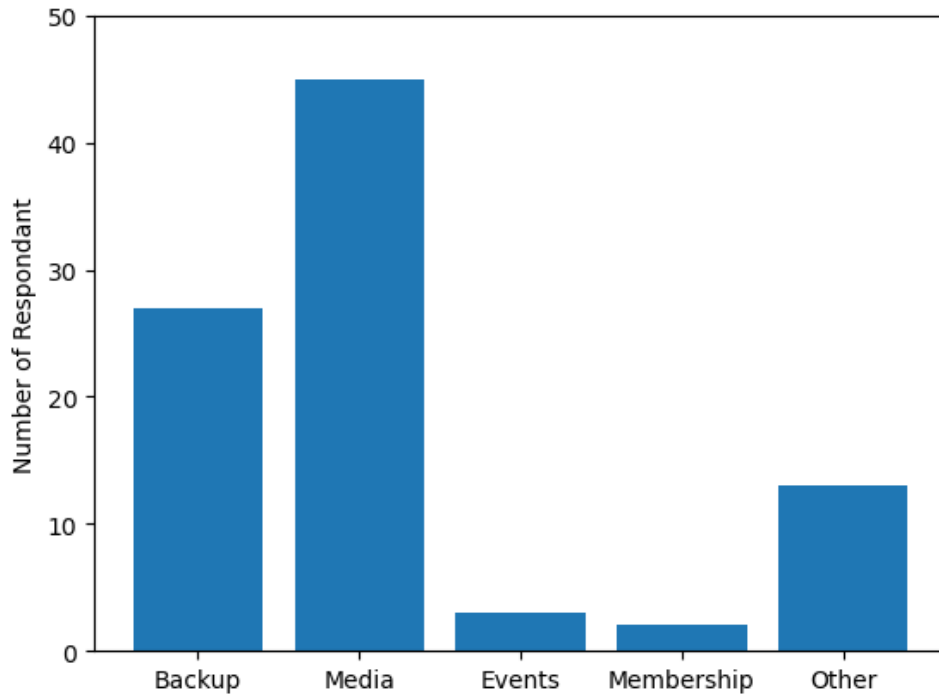


Figure D.13: The functions provided to individual websites by installing third party plugins.

D.7 Statistics for the Website

This was an optional section, though completed by **XXX** respondents. The objective was to gain a degree of insight into the size of the website and its operation, the following information has been collected:

numbers

- Figure D.14 present an overview of the number of Administrators, Editors and Authors as a function of the reported size of the u3a.
- Using the data provided by the *WordPress* dashboard, Table D.4 shows the number of u3a that have Pages, Posts and Groups within a number of bands from <10 to >50. In Figure D.15 the data provided by the *WordPress* dashboard relating to Pages, Posts and Groups is compared to the reported membership numbers.
- Reference can be made to Appendix F that reports the memory requirements for all u3a sites.
- Using the data provided by the *Independent Analytics*, Table D.5 shows the number of u3a that have Visitors, Views and Sessions, within a number of bands from <200 to >300. In Figure D.16 the data provided by the *Independent Analytics* relating to Visitors, Views and Sessions is compared to the reported membership numbers. The collected data refers to the 30 days approximately prior to the submission of the survey response.

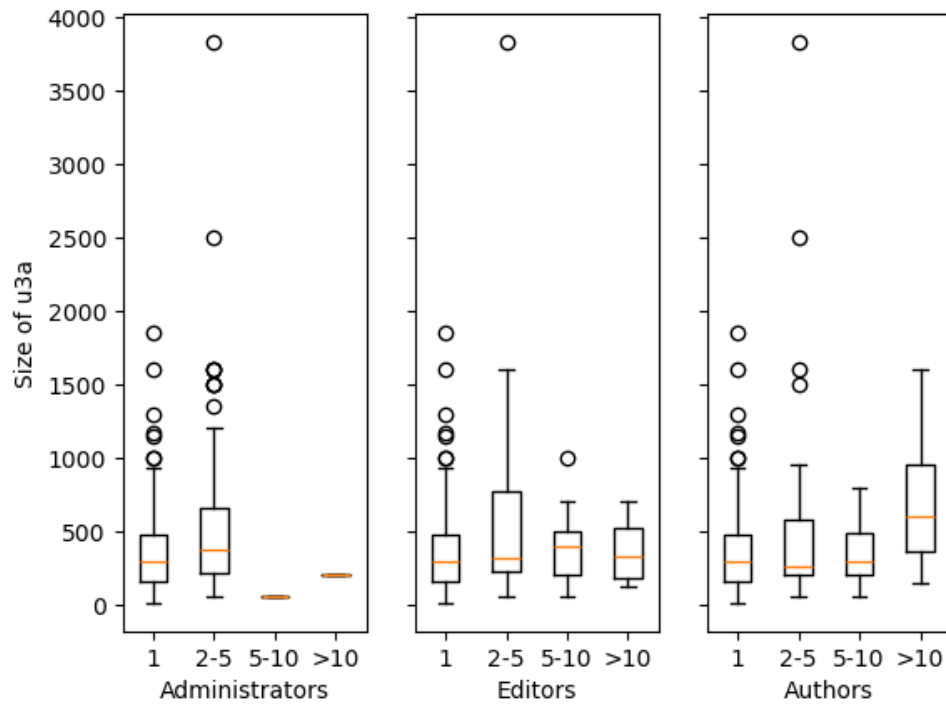


Figure D.14: Website Administrators, Editors and Authors against the size of a u3a group.

	<10	10-20	21-30	31-40	41-50	>50
Posts	232	38	20	6	6	19
Pages	30	147	63	37	21	27
Groups	13	48	72	63	34	95

Table D.4: The number of individual websites against the number of Posts, Pages and Groups as reported in the WordPress dashboard, shown as boxplots.

	<200	200-250	500-1000	1000-2000	2000-3000	>3000
Visitors	155	105	43	10	1	0
Sessions	106	102	68	24	3	1
Views	56	30	70	87	39	31

Table D.5: The number of individual websites against the number of Visitors, Views and Sessions as reported by the *Independent Analytic* plugin. dashboard.

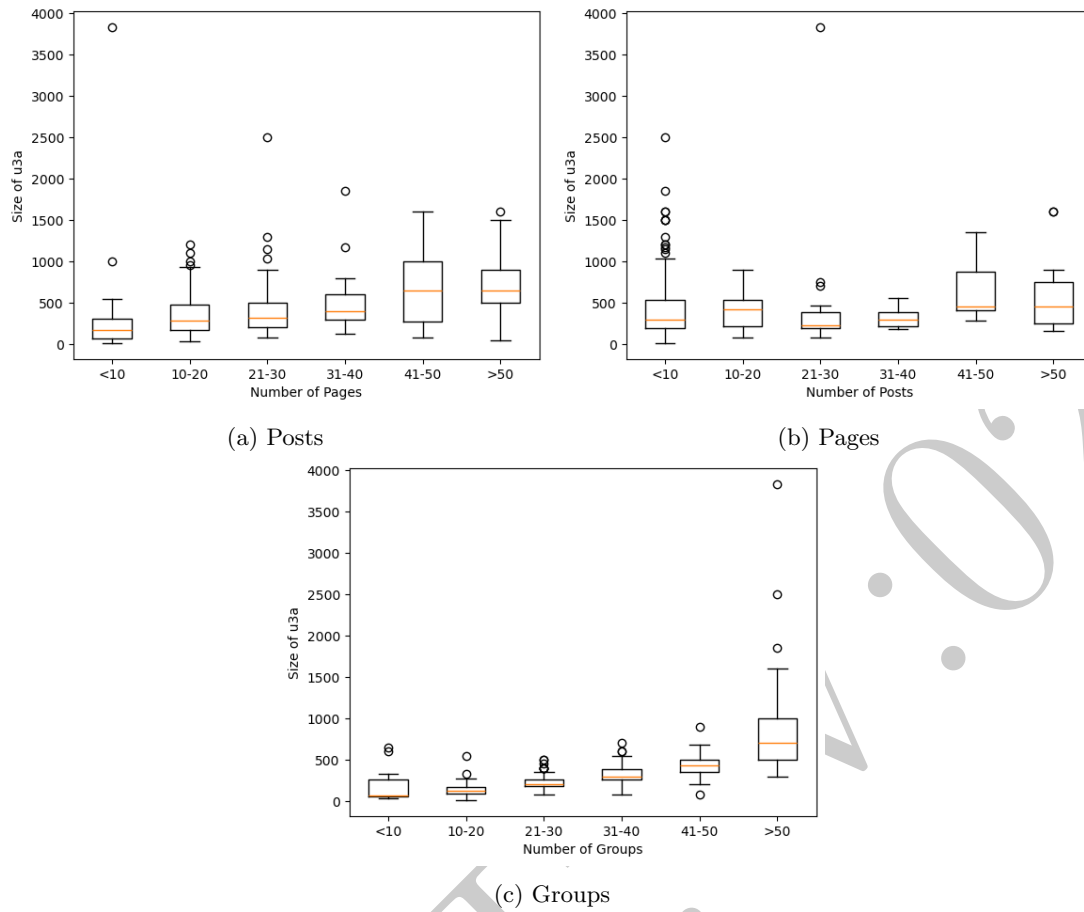


Figure D.15: The number Posts, Pages and Groups as reported in the *WordPress* dashboard against the u3a group membership number, shown as boxplots.

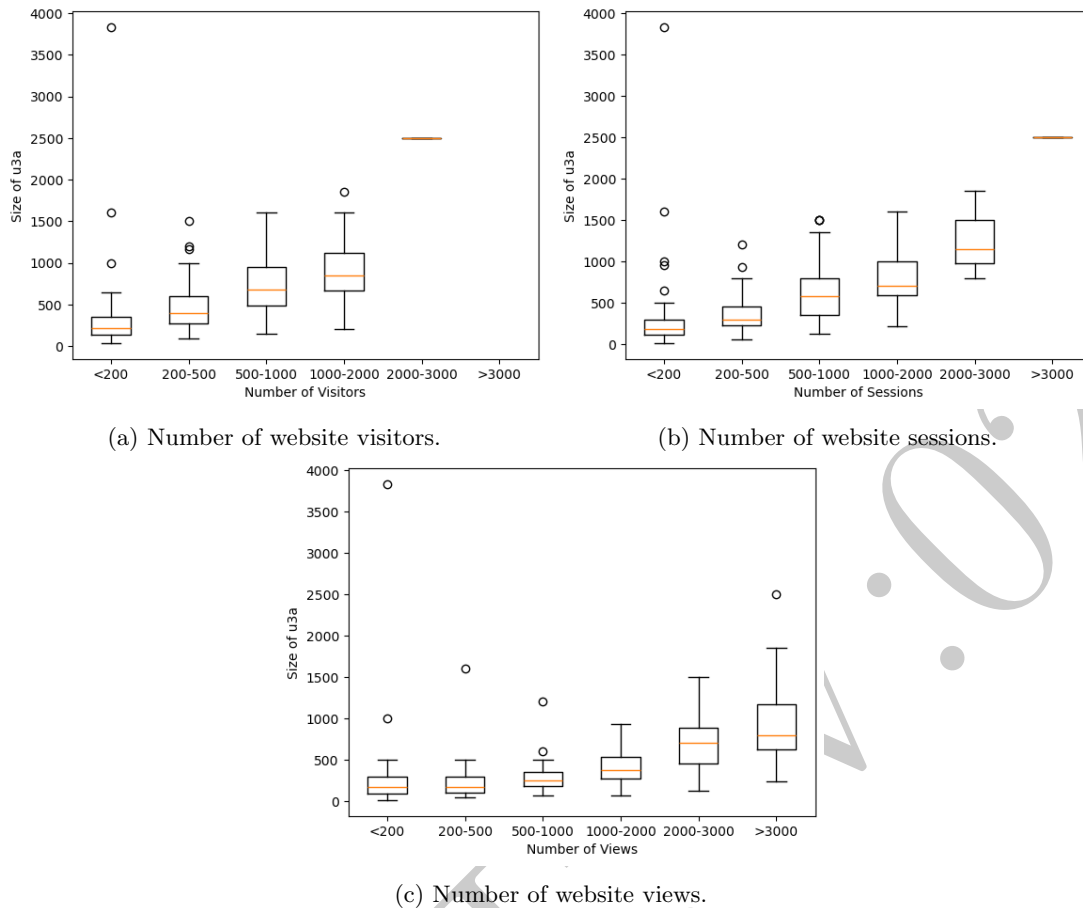


Figure D.16: The size individual websites against the number of Visitors, Views and Sessions as reported by the *Independent Analytic* plugin, shown as boxplots.

D.8 Final Comments

The summary of responses to "Please comment on any matter relating to the current SiteWorks product, for example where improvements or where changes are required. Please consider the complete SiteWork package, including software, user support, training and documentation." is as follows.

Key Strengths The following were identified by the respondents as the key strengths of the project:

High User Satisfaction Widely seen as a major improvement over SiteBuilder. Praised for ease of use, strong support, and smooth migration.

Support & Training Support team and Q&A sessions highly valued. Training and documentation considered strong, especially given volunteer contributions.

Volunteer-Friendly Designed to help non-technical users and support smooth succession. Most users manage well after a short training period.

Hosting & Maintenance Users appreciate not needing to handle hosting, backups, or complex technical activities.

Areas for Improvement A number of improvements were identified by the respondents:

System Integration Beacon: Better syncing (e.g. group leader info) to reduce data duplication. Calendar & Payments: Enhanced tools for event handling and payments (e.g., plugins, gateways).

Media & Content Management Media library seen as messy; needs better indexing and easier maintenance. Authors/editors find content tools complex or intimidating.

Training & Documentation Manuals too long/dense for some. Desire for a quick-start or “idiot’s guide”, together with ongoing training (especially for editors) with simpler, targeted training paths

Design & Layout Challenges with image sizing and layout tools. A requirement for more intuitive formatting, like PowerPoint’s tools. Guteslider styling controls need simplification.

Forms & Automation Need easier web based form tools and auto-alerts for data mismatches with Beacon.

Communication & Usability Interface and language can be confusing. Suggestions include simplified the user interface and help pop-ups. Clearer separation of technical and basic help.

Other Key Points Volunteer sustainability caused by burnout and succession planning remain big concerns. Security & Access tools for better access control, secure member areas, and streamlined logins. SEO & Visibility to make sites more discoverable, especially to non-u3a audiences.

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Appendix E

Third Party Plugins

Plugin Name	Feb 25	July 25	Plugin Name	Feb 25	July 25
Media Library Organizer	80	91	FileBird Pro	1	1
WPvivid Backup Plugin	43	54	Filester	1	1
u3a PDF download stats	6	27	Firelight Lightbox	2	1
FileBird Lite	16	17	Footnotes Made Easy	1	1
WP Last Modified Info	15	16	Form Data Capture	1	1
WordPress Importer	14	16	Gallery Styles	0	1
WP Migrate Lite	17	15	Gosign	1	1
Duplicate Page	7	13	Gutena Forms Pro	1	1
WP Migrate Lite C...	15	13	Gutenberg PDF Viewer	0	1
Enable Media Replace	3	12	Hyperlink Group Block	1	1
Simple History	8	12	IONOS Marketplace	1	1
WP Activity Log	11	11	Image Gallery	0	1
WP Duplicate Page	8	11	Image optimization ser...	0	1
Contact Form 7	3	9	Independent Analytics...	1	1
Woodley & District u3a	0	9	Insert Pages	1	1
u3a Author Settings	9	9	JetFormBuilder	1	1
u3a Sub	0	8	Lightbox block	0	1
Latest Posts	7	7	List category posts	1	1
Post Type Switcher	7	7	Login Redirect Plugin	0	1
Redirection	4	6	Macc members mornings	1	1
TablePress	6	6	Macc revisions	1	1
UpdraftPlus	5	6	MailerLite	0	1
WPForms Lite	2	6	Media Cleaner	1	1
All	0	5	Media Library Categories	1	1
Media Library Assistant	4	5	Media Library Folders	2	1
Sticky Menu (or Anythi...	5	5	Media Library Folders ...	2	1
Yoast Duplicate Post	3	5	Meta Tag Manager	2	1
Author Filters	4	4	MetaSlider Lightbox	1	1
Broken Link Checker	4	4	NinjaFirewall (WP Edit...	1	1
Folders	4	4	NinjaFirewall WP (mu	0	1
Forminator	3	4	Notibar	1	1
Gutena Forms	4	4	OS DataHub Maps	1	1
3D FlipBook	1	3	Omnipress	0	1
Bulk Change Media...	3	3	OneSignal Push Noti...	1	1
Editor Block Outline	3	3	PDF Viewer	1	1
My Calendar	1	3	PDFjs Viewer	1	1
My Simple Space	3	3	Pages with category an...	1	1
WP External Links	2	3	Password Protect ...	1	1

WPForms	0	3	Pdf Embed	1	1
3D FlipBook : Dflip Lite	3	2	Phoenix Media Rename	1	1
Block Visibility	2	2	Photo Engine	1	1
Blocks Animation: CSS ...	2	2	Plugin Toggle	1	1
CRM Perks Forms	1	2	Popup / Modal Block	0	1
Code Snippets	1	2	Prevent Admin Changes	0	1
Contact Form Entries	1	2	Protected Video	1	1
Copy & Delete Posts	2	2	Public Post Preview	1	1
Duplicate Page and Post	0	2	PublishPress Capabilities	0	1
EmbedPress	0	2	PublishPress Future	1	1
Event Tickets	1	2	Re	0	1
Flamingo	2	2	Reciprocal Form Data C...	1	1
Gutenberg	1	2	Redirect Redirection	1	1
ICS Calendar	1	2	Scrolling Container Block	1	1
Members	2	2	Search & Replace	1	1
MetaSlider	2	2	Simple Custom CSS ...	1	1
PDF Embedder	2	2	Simple File Manager wi...	0	1
Print Page	2	2	Simple Iframe	1	1
Real Media Library (Free)	0	2	Simple Lightbox	1	1
Site Kit by Google	2	2	Simple Page Access...	0	1
Smart Slider 3	1	2	Smooth Back To ...	1	1
Sticky Block	2	2	Stackable	1	1
The Events Calendar	1	2	Theme My Login	1	1
WP Go Maps ...	1	2	ThumbPress	1	1
3D FlipBook	1	1	Title Remover	0	1
Absolute Image Plugin	1	1	To Top	1	1
Accordion Blocks	1	1	USP Helper	1	1
Admin Notices Manager	1	1	USP Pro	1	1
Admin Slug Column	1	1	USP Pro	1	1
Advanced Custom Fields	0	1	Ultimate Kit (Styler ...	0	1
Advanced iFrame	1	1	Ultra Addons for Conta...	0	1
Advanced iFrame cu...	1	1	Unreal FlipBook	1	1
Akismet Anti	0	1	Upload Folder Manager	0	1
Ally	0	1	User Registration & Me...	1	1
Back Button Widget	1	1	User Submitted Posts	1	1
Backuply	0	1	WP Client Reports	1	1
Better Find and Replace	0	1	WP Fastest Cache	0	1
Better YouTube EmB...	1	1	WP Go Maps Block	1	1
Blocks CSS: CSS Editor...	0	1	WP Latest Posts	1	1
Bulk remove posts from...	1	1	WP Mail SMTP	0	1
CSV Importer	0	1	WP Map Block by ...	1	1
Clickable Blocks	1	1	WP Popups Lite	1	1
Conditional Fields for...	0	1	WP Ultimate CSV Im....	1	1
CookieYes - GDPRi...	1	1	WP Ultimate Exporter	1	1
Document Gallery	1	1	WP	0	1
Edinburgh u3a ...	1	1	WPCode Lite	1	1
Edinburgh u3a Group ...	1	1	WPCodeBox 2	0	1
EditorsKit	1	1	WPFront Scroll Top	0	1
Embed PDF Viewer	1	1	Wayfinder	1	1
Essential Addons for E...	0	1	WordPress automatio...	1	1
Essential Blocks	1	1	YYDevelopment	1	1
Fabrica Synced Pattern...	1	1	Yoast SEO	0	1
Favicon by RealFavicon...	1	1	gu3a_event_calendar	0	1
Featured Image fro...	0	1	iFolders	1	1

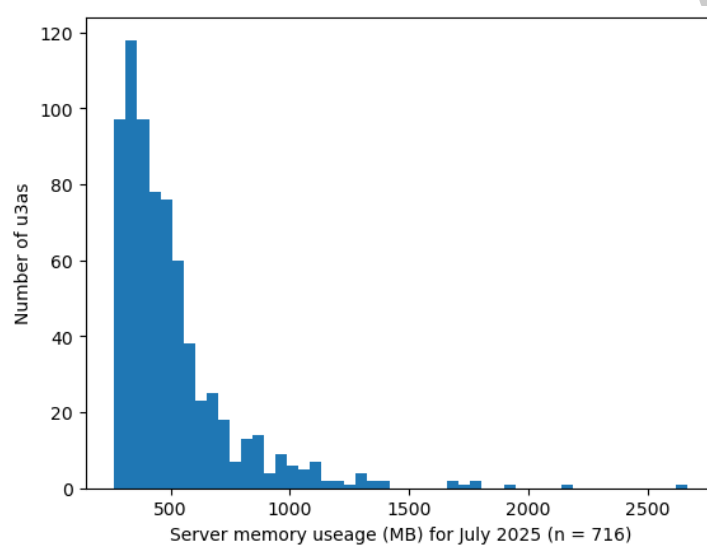
FileBird Doc Libr...	0	1	reSmush.it Image ...	0	1
FileBird Doc Libr...	1	1	wpDataTables	0	1

Table E.1: List of installed third party plugins, with the number of active in February and July 2025, note some of the Plugin names have been truncated.

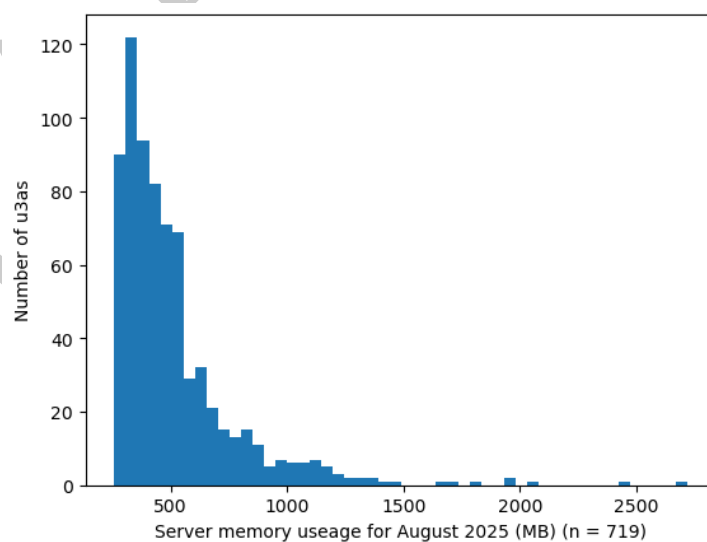
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Appendix F

u3a *Site Works* Server Requirements



(a) Server memory requirements for u3a in June 2024



(b) Server memory requirements for u3a in August 2024

Figure F.1: Server memory requirement for u3as