

u3a Computing Group

Alan Hopwood, 7 December 2023

Agenda



Welcome

Current News, Issues and Questions

Future Topics & Next Meeting

Topic: Beacon and our implementation

AOB and Follow up

Current News, Issues and Questions

Anything to discuss?

Future Topics

What is the Question?

Any new topics to add?

Topic	Votes
Streaming - the best way to go	4
Computer languages - functionality vs ease of use	4
Laptop vs Tablet	4
Microchip design	2
Being safe on the internet	2
History of computer development	2
Bluetooth	1
Digital communications / information encoding	1
Chromebook	1
Mac vs Windows vs Linux	1
Printing from an Android tablet	1

Presentation Beacon

Agenda

Beacon

- Previous situation
- System selection
- Tailoring / Options
- Implementation
- Data migration
- Transition and Training
- Demonstration

Previous Situation

- Membership information
 - Access Database created ~ 2006
 - 32 tables (5 used in last 5 years)
 - 158 queries (5 used in last 5 years)
 - 7 forms (1 used in last 5 years)
 - 139 Reports (13 used in last 5 years)
 - Data
 - Contact details
 - Dates – joined, validated?
changed?
 - Partners name
 - Deliver round
 - TAM wanted
 - Household?
 - Left (reason)
 - Payment method
 - Member of other u3a

Previous situation

Finance	All managed on paper Reports manually entered into a form for printing
Groups list	Kept by various CMs separately
Group Leader list & Contact details	Kept by various Committee Members(CMs) separately
Group Membership	Maintained by each Group Leader in various ways
Group attendance checking	Attendance sheets checked against membership list manually. Updated a separate attendance database.

Previous situation

Send email to members	Each GL has own email list. Membership Sec: <ul style="list-style-type: none">• Export spreadsheet from Membership dB. Split into 3.• Upload to mailchimp for sending• no feedback of corrections
Timetable	Manual entry into spreadsheet (then partially automated)
Venue Information	Not managed except addresses

System Selection (April 23)

Functionality list

- Membership management
- System to cope with
 - Groups
 - Events
 - Finance
- Communications to members

Looked at ~ 10 systems including:

- Beacon
- MemberMojo
- Coacha
- Managemyclub

Differentiators

- Allowing partners to share an email address (have ~ 30)
- Recognised roles: Membership Sec, Treasurer, Groups Coordinator, Group Leaders
- Links between Groups, venues, Calendar
- Ease of use by large group of users
- Training and Support
- Cost

What is Beacon?

Beacon holds information:

- **Members:**
 - **Membership status & dates**
 - **Contact details**
- **Groups**
 - **Description**
 - **Leader**
 - **Meeting schedule**
 - **Meeting Venue**
 - **Members & waiting list**
- **Venues**
 - **Address**
 - **Notes**
 - **Contact details**
- **Finance**
 - **Accounts**
 - **Transactions**
 - **Gift Aid**

Beacon supports our work:

Managing Membership

- joining, renewing, printing cards
- Online joining and payment
- Identifying new members, non-renewals

Managing Groups

- Managing Group membership and waiting lists
- Setting up Meeting Schedule and location

Managing Venues

- Making a venue available to Groups

Finance

- Recording Income and Expenditure
- Reconciling bank accounts

Communications

- One set of email addresses for use by authorised roles
- Send out email to all or sets of members
- Print address labels

Investigation & tailoring

- Having signed up to use Beacon, The TAT provide:
 - Implementation guide
 - A demo system for us to configure and play with
 - User guides.
- At this stage, the work is in:
 - Understanding the Beacon system
 - Selecting the Beacon options that match our needs
 - Planning how to change our ways of working to take advantage of Beacon.

Membership Concepts

Is about the process of Joining, renewing, leaving and providing us with a database of members.

Concepts used:

- **Membership Class**
- **Membership Status**
- **Membership year**
- **Fee structure**
- **Extended membership on Joining**
- **Advance Renewals period**
- **Grace Lapse period**

- **Membership is automatically linked to Finance. Every join and renewal creates a financial transaction linked to the member.**

Membership - Classes

Choices

- **Classes determine the Annual Subscription paid.**
- **We can set the subscription for each Class defined**
- **The classes already provided:**
 - **Individual**
 - **Joint: 2 linked members paying lower fee - not the same as sharing an address to avoid duplicate posting.**
 - **Associate: member of another u3a**
- **We can add classes and not use those above**

Currently:

- **Individual: Most members - £20**
- **Associate: Members who are already in another u3a - £16**
- **Honorary: We have one. £0**
- **We do not use “Joint”**
- **Do we need any other classes?**
- ***We need to investigate whether we should have “joint” classes to allow Gift Aid for partners with one tax payer.***

Membership - Status

- **Membership Status helps the membership management process.**
- **Current, Lapsed, Deceased & Resigned are provided as standard. We can add others if required?**
- **These actions are supported but not automatic**
 - **Lapsed, Deceased, Resigned - remove names from Group Lists**
 - **Lapsed, may be worth follow up; not counted in numbers for TAT returns**
 - **Deceased - remove email from records to avoid possibility of sending an email**
- **Do we need any additional membership status types?**

Membership Fees & Joining

- **We can have different fee structures:**
 - **Rolling - renewals due 1 year from joining**
 - **Annual - same fees whenever you join**
 - **Annual - fee varies by month**
- **We can extend membership for the following membership year if joining from a specific month**

Our Current practice is:

- **Membership year starts April 1st.**
- **Annual fees, same fees whenever you join**
- **If joining in Jan to March, the following membership year is included.**

I am assuming that we don't want to change this?

Membership & Renewals

Choices

- Members can renew from the beginning of the “Advance Renewals Period”.
- The “non-renewals” list contains members who haven’t renewed before the end of the “Grace Lapse Period” as opposed to end of Membership Year.

Note

- The process of changing member status to Lapsed or removing Lapsed members from Group lists is not automatic

Currently

- We don’t have a set “Advance Renewals Period”.
- Our practice is to chase non-renewals after about 4 weeks and consider non-renewals no longer members after 3 months.

Consider (to improve the chase process)

- Asking members to renew by 1st April
- Names show up red in Group member list after 1st April
- Reminder to non-renewals first week April
- Lapse and remove from Group Memberships after 2 months

Membership - other

- **Delivery Rounds**
 - **Beacon does not cater for Delivery Rounds**
 - **Propose: Custom field with Delivery Round number**
 - **Will be exportable, but not included in standard label print.**
- **TAM subscription**
 - **Most u3as use a “Poll” to indicate whether member wishes to receive TAM.**
 - **We could:**
 - **Have Membership classes that include/exclude TAM.**
Would allow for single transaction.
 - **Keep to separate transactions for membership and TAM and use a Poll as record. (think this is safer)**

Finance - Concepts

Beacon allows us to keep a record of, and report on, all our financial transactions.

Concepts:

- Financial Ledger
- Transaction
- Credit Batch
- Account
- Transfer (between Accounts)
- Reconciliation
- Category
- Financial Year
- Brought forward amount
- Gift Aid
- PayPal
- Group Ledger

Transaction Record

- Date
- Account
- Amount
- Payment type (cheque, cash, etc.)
- Category (Membership, attendance fee etc.)
- payee / payer
- membership number (of payer)
- cheque number
- Gift Aid eligibility
- details (free format text)
- Can also associate a transaction with a Group

Finance - Accounts

- In Beacon, there is one main ledger with transactions split into different Accounts.
- Beacon has one account as standard - “Current”. Others are provided as required.
- Propose we use multiple accounts:
 - Current to mirror our Lloyds Current account
 - B.B. to mirror our Lloyds B.B. account
 - PayPal is required for when we accept online joining and renewals
 - Cash for the Treasurer’s cash transactions
 - Membership for Membership Sec use for cash and cheques (not BACS which go into Current)
 - Attendance for Kate use for cash and cheques (not BACS which go into Current)

This structure allows:

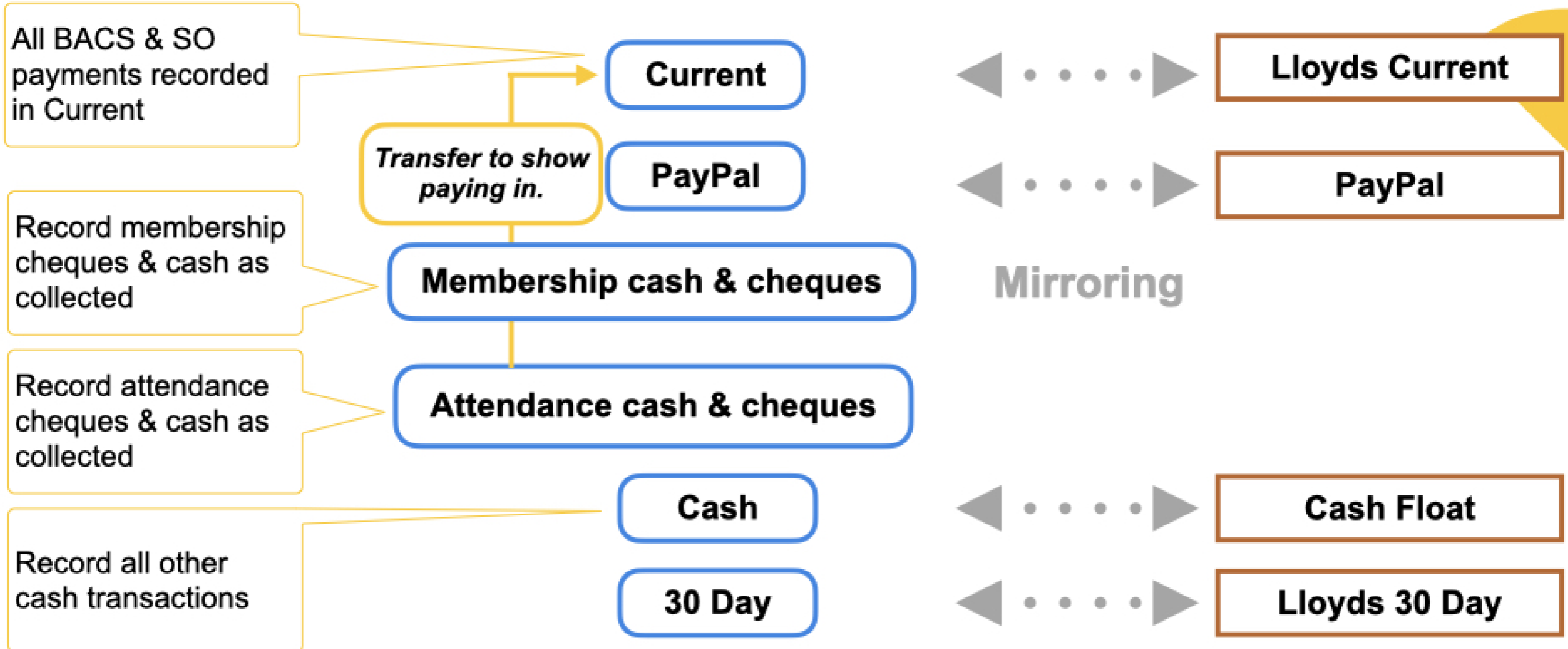
- **Cash and Cheque transactions to be entered into the various accounts as they happen and then a transfer made to “Current” when paying into the Bank.**
- **“Current” to be more easily reconciled with the Lloyds Current account because transactions are identical amounts.**
- **Everyone who holds a cash float to more easily reconcile their float**



Finance - Accounts

Beacon Accounts

Bank Accounts & Cash



u3a

Finance - using Categories

- Categories are used to view areas of income or expenditure in one or all accounts.
- Our categories might be:
 - Income: Membership, Gift Aid, TAM, Advertising, Referrals, Attendance
 - Expenditure: Venue hire, TAT fees, IT Services, TAM, Newsletter, Shared Services, Committee Operations...

Accounts

Categories

	Sum of accounts	Current	PayPal	Membership	Cash	Attendance
Membership	X	X	X	X		
Donations	X	X	X	X		
Attendance	X	X				X
TAM	X	X	X	X		

Finance - Categories

- Categories allow us to identify types of transactions in any or all accounts. We use categories in our monthly and annual reports
- Beacon uses same list for Expenditure and Income
- We can add categories, but after reconciliation cannot remove a category

Current Practice

• Income

- Membership
- Donations
- Group meeting Fees
- Monday meetings
- Gift Aid
- Riviera Travel
- Advertising
- rent and refunds
- Sundry Income
- Third Age Matters
- Interest

• Expenditure

- Hall/ Room Hire + Zoom
- u3a Capitation & TAM
- Capital Expenditure
- Group Expenses
- Facilities and services
- Newsletters
- Committee Expenses
- Speaker Fees
- Refreshments
- u3a Network Meetings
- u3a Day
- Sundries

Finance - Categories

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Propose:

- Membership
- Donations
- Gift Aid
- Third Age Matters
- ~~Advertising~~
- Referrals (from Riviera & Ramblers)
- Attendance Fees
- Interest
- Third Age Trust fees
- Venue Hire (for Groups & FMM)
- IT services (website, Beacon etc.)
- Newsletter
- Shared Services (Licenses, volunteer centre)
- Committee Operations (costs related to committee)
- Group Support (GL meetings)
- FMM Support (Speakers & refreshments)
- Membership support
- New Member attraction
- Investment (Equipment)

Data Protection and Privacy

- **Sensitive Data:** Beacon holds Member contact information, but no account or bank card data
- All stored data is encrypted
- Beacon runs in a secure datacenter and is backed up to a server at a different location.
- Access to Beacon is by user ID and password
 - Initial set up by use of 5 pieces of member information
 - Forgotten passwords can be reset by link sent to member's email
- GDPR (General Data Protection Regulations) compliance is straight forward.
- GDPR requires us to allow access to data only to those whose roles need it.
- Beacon's Role based authorities allows us to allow & restrict access as needed.
- Any member can choose to "hide" their contact information from Group Leaders.

Roles and Privileges

- We can change roles and privileges at any time, but need to start from somewhere.
- Membership sec:
 - Add, lapse member, change member record (everything related to Membership)
- Treasurer:
 - Create accounts, categories (everything related to Finance)
- Treasurer, Kate, Membership sec
 - Create transactions, transfer money
- All committee
 - View (but not download) membership list
 - Send email to members
 - View accounts & transactions

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How do we control access to information?

Access to all data and functionality on Beacon is controlled by our administrator:

- allocation of roles to users
- definition of privileges to roles

Home - Users List - Add Role

User Roles

Role Name	Committee role
Administration	
Group Leaders	
Groups Coordinator	
Membership Secretary	Y
Treasurer	Y

Finance: accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Finance: batches	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Finance: categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Finance: ledger	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/> Download
Finance: reconcile accounts	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/> Reconcile
Finance: statement	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/> Download
Finance: transactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Finance: transfer money	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Gift Aid declaration	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/> Download & Mark
	<i>View</i>	<i>Create</i>	<i>Change</i>	<i>Delete</i>	<i>Other</i>
Group faculties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Group leaders	<input type="checkbox"/>				<input type="checkbox"/> E-mail/Labels
Group ledger (all)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Download
Group ledger (as leader)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Download

Privileges

Assign privileges by ticking the appropriate checkboxes below and then pressing Save Privileges. For security, always assign the minimum privileges necessary

	<i>View</i>	<i>Create</i>	<i>Change</i>	<i>Delete</i>	<i>Other</i>
Address labels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download
Addresses export	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download
Audit detail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Audit trail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Calendar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download
Data export + backup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download
E-mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Send
E-mail addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download
E-mail delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	All
E-mail messages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Finance: accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Finance: batches	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Finance: categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Finance: ledger	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Download
Finance: reconcile accounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Reconcile
Finance: statement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Download
Finance: transactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Finance: transfer money	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Gift Aid declaration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Download & Mark
	<i>View</i>	<i>Create</i>	<i>Change</i>	<i>Delete</i>	<i>Other</i>
Group faculties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Group leaders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E-mail/Labels
Group ledger (all)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download
Group ledger (as leader)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download
Group records (all)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download members
Group records (as leader)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download members
Group records (as member)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download
Group statement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download
Group venues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Groups list	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Groups: add members by name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Groups: add members by name (as leader)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Groups: add members by no	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Groups: add members by no (as leader)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Letters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download
Letters: standard messages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Member classes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Member record	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Member statuses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<i>View</i>	<i>Create</i>	<i>Change</i>	<i>Delete</i>	<i>Other</i>
Members list	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download
Members: delete expired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Members: non-renewals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Lapse
Members: recent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download
Membership cards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download & Mark
Membership renewals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Renew
Membership statistics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Download
Offices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Pol set up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Public links	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Rule record	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Roles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Settings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
System messages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
User record	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Users list	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	<i>View</i>	<i>Create</i>	<i>Change</i>	<i>Delete</i>	<i>Other</i>

Save Privileges

Communications - Email

- **Authorised users can send email to sets of members. E.g.:**
- **Membership Secretary to all members**
- **Membership Secretary to non-renewers**
- **Groups Coordinator to all Group Leaders**
- **Group Leader to members of their Group**
- **Secretary to Committee Members**
- **Members receiving emails do not see other members' email addresses.**
- **Members can hide their contact details from Group Leaders. GLs can still send them email.**
- **The “from” address can be the senders own address or the “Officer” address**
- **Standard Email Templates can be stored for repeated use.**
- **Copes with shared email addresses**
- **Delivery status is reported**

Implementation Steps

- Configure Demo System
- Pilot trial data collection
- Review operational needs and test solutions .
- Collate, cleanse and format data – send to Beacon central
- Check operational system provided
- Local system set up
 - System users
 - Group schedules
 - Group Members
- Align Website
- Induction and training

Data Collection and transformation

- Membership data from Access db
- Groups, GLs, Venues, timetables from all over.
- Data had to be reformatted and collected into template

Must load clean and accurate information.

Data Collection and transformation

Example issues

- Addresses had to be very specific format – must have “town” defined and in correct column
- Postcodes had to be perfect – lack of space caused reject
- Membership partnering must be reciprocal – so if a partner was no longer a member, caused reject
- Cross references “tags” must be identical wording spaces everything.
 - Partner addresses
 - Venue names used by Groups
- Different fields would not accept special characters e.g. quote mark
- Dates had to be in specific text format.
- Lapsed members still needed a renewal date

Training

- Individual care and attention for Treasurer and Membership Sec.
- Strategy for GLs:
 - One to one
 - Provide access in session
 - Bring Group information up to date
 - Populate Spring Calendar
- Use “TryBooking” system for GLs to book sessions
- 26 one hour sessions set up for 58 Group Leaders, up to 4 at a time

Transition

- 4th October: Paused Membership & drew line on Finance
- 7th October: Sent data template to Beacon Central
- 8th October: Live system made available to us
- 10th October: Membership processes restarted
- 11th October: Finance started using Beacon
- 19th October: Pilot GL Introduction Session
- 21st October: Website reorganised to link with Beacon
- 25th October to 13th November
GLs trained by Steve, Roger, Mark, Les, Kelvin,
Ian & me.

Demonstration

- Original Access DB
- Data Template
- Demo Beacon System
- Current Website and Operational Beacon System

Thank You