Welcome to Beacon News 10

There's plenty for U3A treasurers in this edition of Beacon News. We describe an intuitive and simple way to use Beacon Finance to manage membership subscriptions and renewals. There's a further article this month about the recent Beacon Upgrade Focus Groups, this time looking at what is required of a Beacon Finance module. You'll find another handy Beacon Tip, and another article in the Beacon People series, this time about our very efficient and hard-working Beacon Team Administrator.

What the Focus Groups Said - Finance

Beacon News 9 described some of the feedback received from the Beacon Upgrade Focus Groups that related to membership and groups. In this edition we describe some of the comments made about Finance. These comments, and all other focus group feedback, will be considered as Beacon Upgrade takes shape.

U3A treasurers and administrators would like a transaction entry screen that is user-friendly, and that could be automated, for instance by importing transactions direct from a bank export file.

Transactions must be capable of being edited easily. Mistakes will happen and volunteer treasurers need a forgiving system.

At some U3As a financial year is the same as membership year. At others the years start on different dates. Beacon Finance must provide support for both and must correctly handle renewals that are received in the 'wrong' year, with accrual of membership funds across financial years if necessary.

It can be difficult to persuade treasurers to use Beacon if they are already expert at another system. However they should bear in mind that this can cause difficulties when they hand the post on to somebody with less book-keeping expertise.

Flexibility in handling Gift Aid is needed as U3As differ in their interpretation of HMRC guidance, for example in the area of joint membership. But only to a point as Beacon should help U3As to comply with HMRC (and charity) rules.

Beacon should better meet the needs of auditors and account examiners, and it should be possible to generate an AGM-ready report.

Online payments are increasingly common and are popular with members, but PayPal isn't universally welcomed. Beacon should offer a choice of payment processors.

Cash creates unnecessary work for treasurers but its use is declining.

Cheques are still used; there was discussion about ways of managing unpresented cheques (inbound and outbound).

Beacon Finance - Simplify Your Ledgers

Beacon is evolving. Having taken over as support lead in October 2018 (says **Frank Bailey**) I have seen many ways of managing Membership data both with and without Beacon. I have spoken with administrators, membership secretaries and treasurers; all agree that Beacon has improved the management of their U3A.

The one area that U3A's tend to struggle with is the financial element in Beacon; there are many reasons for this. The financial reporting and control of a U3A is extremely important, so some treasurers feel secure and comfortable using systems that they have always used, whilst others look at payment batching and account reconciliation as a bit of a jungle where all transactions are made in the forest of the Current account.

I would like to suggest to you a different and I believe a better way of using account ledgers and making them work to your advantage.

The way it works is that you need to set up three main ledgers:- Current, Membership and Cash.

The Golden rule is that nothing is recorded in the current account unless it mirrors the bank statement transaction for transaction.

The Membership Ledger is used for recording all money,

cash or cheques received by the membership secretary. All online payments would go direct to the PayPal Ledger. Any membership payments, by BACS/Faster Payments would go direct to the Current ledger and this is how it would show on the bank statement.

When Membership fees are banked they show in Beacon as a transfer from the Membership to Current Account with the paying in slip number as a reference. To achieve this, use the "Transfer Money" option on the "Ledger (by account)" screen. The advantage of using this method is that no batching or reconciliation is required in the Membership Account. The balance showing at the bottom of the Membership Ledger is the cash or cheques the Membership Secretary is holding un-banked.

Note that membership fees cheques and cash need to be paid in separately to any other income.

This gives a clear view of

Membership money received and an uncluttered Current account ledger showing only sums that can be found on the Bank Statement. Similarly, this method can be used with a cash ledger, showing cash in hand and cash banked. Obviously at the end of the financial year both Membership and Cash Ledgers should have a balance of zero.

I hope this makes sense. If you require your Membership Renewal Page to point at Membership instead of Current, this can be set up by the help desk.

Help Desk? I hear you say. Yes we are setting up a Help Desk, with Roy Biggs taking the lead for ongoing support. The access to the Help Desk will be via the Beacon Webpage on the U3A National web site.

I think I have said enough for one Newsletter. If you want to know more, I will be at National Conference in August along with a small team so please come and see us.
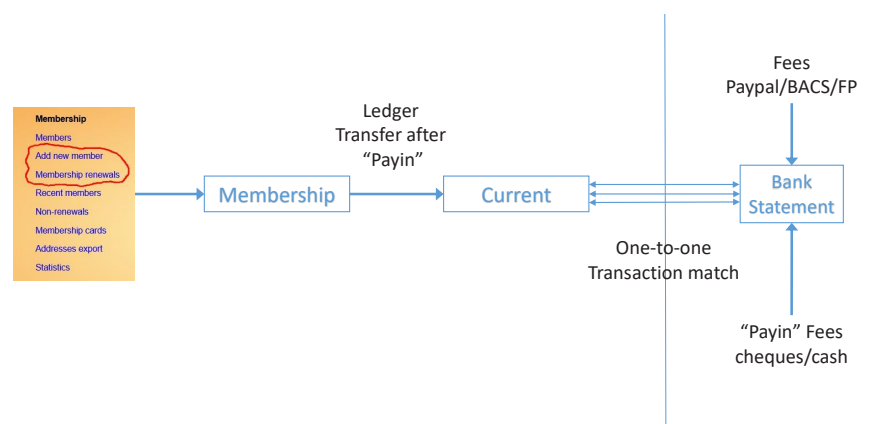
How long does it take to move to Beacon?

This is a reasonable question to ask, but there isn't a simple answer. Your go-live date will depend on factors such as how you currently manage your U3A; the time until the start of your next membership or financial year; the complexity of your data migration needs, and the speed of your U3A's decision-making processes. A U3A thinking of joining the Beacon family will discuss dates with their supporter.

One U3A took just four weeks from initial enquiry to live running. Another took exactly four years, to the day.

These are extremes, but it seems that migration to Beacon typically takes about nine months, which just happens to be the human gestation period.

That means that the migration team have now delivered 333 Beacon Babies!

Beacon Tip

Here is a time-saving tip on how to create a short-cut to your U3A's Calendar on the Home screen of your iPad or iPhone.

While viewing the Calendar in Safari, tap the Share icon (1), followed by Add to Home screen (2).

This will add an icon to your Home Screen (3) which you can tap at any time to go directly to the Calendar.

Thank you, Hammersmith and Fulham U3A, for this tip. Please send yours to news@beacon.u3a.org.uk.

Next Month

Next month we'll tell you about Beacon at the U3A national conference, and the new help desk. Plus, of course, your news and tips.

Beacon People — Marian Luck

In each edition of Beacon News we try to tell the story of a Beacon Person: one of the hard-working men or women who give their time to help other U3As. This month's star of Beacon People is Marian Luck, whose cheerful and efficient administration helps the Beacon team and therefore the whole Beacon community.

It was at a U3A All Scotland Assembly in March 2016 that I first came across The Beacon System. Our U3A's Membership Secretary and I had travelled to Haddington, just outside of Edinburgh, especially to hear about the different IT systems available to U3A's as we both thought it would be beneficial to our U3A.

The presentation told us about U3Aweb, Wild Apricot and Beacon. We reported back to our committee on the different systems and the costs. We recommended that the Beacon System would suit us best and as it was, at the time, free of charge the committee agreed that we should investigate it further.

Our membership secretary applied, and we received instructions on how to format our data. I took on the role of getting this task done. Thanks to the help and patience of our supporter,

Stephen Shipley, the task was successfully completed. I'm sure I must have tried Stephen's patience severely with some of the questions I asked him but we got there in the end. At the time, Stephen was the only person giving this support; but of course there is now a whole team of supporters available to help U3A's who are thinking about adopting Beacon and that support is there for the whole journey until 6 months after the U3A has had its live site up and running (*Support is no longer limited to six months but is now available for the entire Beacon journey. We'll describe the new help desk in the next Beacon News - Ed*).

We got our live site up in September 2016 and I started to populate it with Groups, venues etc. Now, in 2019, we are still very happy with our choice and we look forward to the upgrade coming along next year.

In April of 2017 I attended a Beacon Conference in Birmingham and volunteered to become part of the Beacon Team. My role is Team Administration and as such I have an overview of the whole team which consists of not only supporters but technical, website, migration, documentation and various other personnel. We are a team of about 40 volunteers and are from all areas of the UK and are always very pleased to welcome new people to the team. You don't need to be technically inclined, or have a lot of time to give, all you need is enthusiasm and a few free hours. The amount of time you put in is totally up to you. if you feel you would like to join the Beacon Team please get in touch via the website. We look forward to hearing from you.

Marian Luck

Fife U3A & Beacon Team Administrator