



Welcome to Issue 8

Welcome to another edition of Beacon News, the second in its new format. I'd like to thank those of you who complimented the last edition, and those who've sent messages to news@beacon.u3a.org.uk. It's good to know that Beacon News is being read so please keep the comments and questions coming.

In this edition you'll find more news on the Beacon upgrade project and on the task of specifying the changes, which has now begun in earnest. There's an article on the Beacon finance module and a recommendation from a Beacon supporter on how U3As should manage their email addresses to improve data security as well as providing a better service to members as committee members change.

Beacon Upgrade

Sam Mauger, Chief Executive of the Third Age Trust, has been telling Beacon News about recent work by the Beacon Working Group.

The Beacon Working Group is the Third Age Trust's top-level group for this important project. They've been pulling together information from far and wide about how Beacon is used, and how U3As would like to see Beacon evolve.

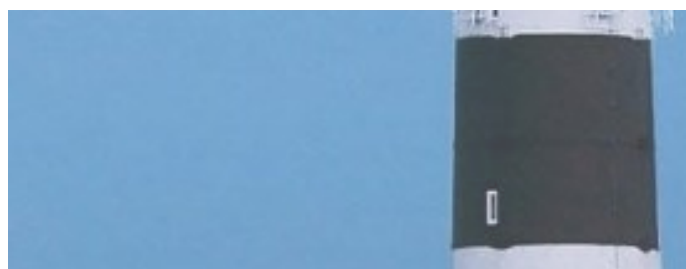
This information has come from many sources: the Beacon Forum; surveys to U3As about membership management, and contacts with U3As who use, or who don't use, Beacon, including those who embarked on the journey but chose not to proceed.

The Working Group has received emails from users containing requests, suggestions opinions and comments. These will all be considered.

There have now been three focus groups discussing membership, finance and the web. These meetings allowed in-depth discussions to

take place and were recorded. The results will be analysed and fed into the Beacon upgrade specification process.

Sam told Beacon News, "We hope to have the outline specification by the summer at which point we will come back to U3As with what this looks like. There will be further views and opinions at this point. We expect that once we have a specification, the shape of Beacon will enable us to understand the type of supplier(s) that we should investigate. As we do now, we will continue to work with the Beacon Team in the future with Beacon Upgrade, as support will be needed on a continuing basis. The Beacon Team are a valuable and vital part of the service, as Beacon is so much more than a piece of software".



Training Guides now On-Line

The Beacon website at <https://beacon.u3a.org.uk> is now fully live, so please add it to your bookmarks. The training guides promised in the last edition of Beacon News have now been uploaded to the Help section of the site. The guides are in 10 categories including Getting Started, System Setup, Membership, Groups and Finance and cover very many of the common Beacon tasks.

A better way to set up email

All U3A Committees should give consideration to adopting designated email addresses for their individual roles (rather than using their personal email addresses), which should be used specifically for any U3A related business/affairs.

The email addresses should differ in only their role title but it is advisable to have the same extension related to the location of their U3A for easy recognition.

For example:

secretary@demotownu3a.org.uk
chairman@demotown3a.org.uk

There are several sources that provide email and other options for free [or at very low cost] to 'not for profit' organisations e.g. Office 365, one.com etc. to name but two so it is worth searching the Internet for such options. The email addresses could easily be set up and allocated by a website administrator or anyone who has some basic knowledge of IT.

There are multiple benefits in adopting this practice.

This option affords easy transition of information as and when role holders change as it allows new incumbents to view previous emails and contacts.

It also provides the option of allocating 'cover' should a role holder be absent due to illness or extended leave, as access to the email address could easily be transferred to a deputy or stand-in during such times.

Another benefit to dedicated email for each role is that it provides a consistent front to the general U3A membership, as they become familiar with contact information for the committee, and the email addresses can be published with impunity.

In Plymouth the committee have had such an email system in place for the last few years and the benefits of offering a constant source of contact details to external bodies and our membership has proved extremely fruitful, with a positive step towards guaranteeing that no source information is lost or overlooked as and when roles have changed hands which has afforded an easy transition, as opposed to having to transfer information in bulk from any personal email accounts.

Marylin Lean
Plymouth U3A

A Beacon user says ...

"Beacon is the bees' knees!"

David Barrett, Worcester U3A

Beacon Reaches 300

On Thursday, 11th April Beacon passed another milestone—its 300th user. The 300th U3A was Littleborough, in the north-west of England. Lynn Wild describes how it happened.

Our U3A had concerns about Data Protection as our then current system consisted of several spread sheets stored on Dropbox. It was also felt that as more IT savvy members would be coming along, we needed a more interactive system. Beacon was offering a more organized one-stop-shop system that would also meet Data Protection requirements, present and future.

Our Beacon journey really began in November when a group of 6 went on an “away day” to visit Hale and District U3A for a demonstration of the Beacon system.

It was after this visit that our Committee decided to go ahead with the next phase and requested the “Beacon Journey Pack”

A project group of four began looking at the Beacon system and how it would compare with our (then) current system.

The Beacon Demo, along with the help from our supporter (John Alexander), proved an invaluable tool.

The decision was taken on 28 January 2019 that our U3A would proceed to the next stage.

At this point we wrote ourselves a timeline with easily achievable goals, taking into account Committee Meetings, Membership Renewals and

Group Convenors’ training.

The loading of data onto the “Beacon Preparation Document” was quite straightforward and was mostly completed by copying and pasting from our existing spreadsheets. The most time was spent in the checking of data and the splitting of addresses into the various columns.

The weather played its part as we had plenty of time on our hands because of the snowfall Littleborough had in early February.

At this point, we stopped using our existing Members list and just used the BDM version.

The decision was made to wait until after our April monthly meeting to submit our data because our annual membership renewals would be at their most up to date. This also allowed a further checking stage.

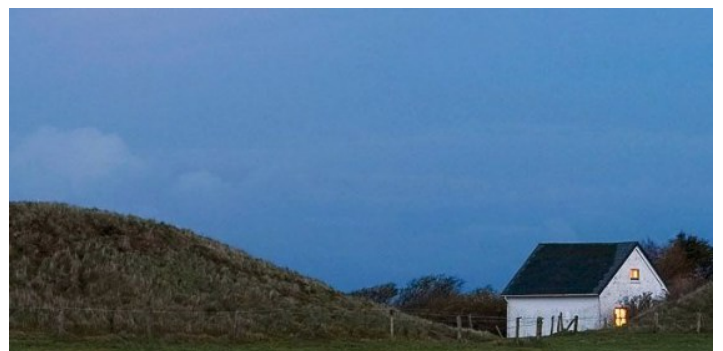
After submitting our data we were looking forward to a Beacon-free few weeks – not so. We were up and live within a few days. Thanks Migration Team!

We are looking forward to rolling out “Beacon”, taking it a step at a time so members feel they are being gently nudged rather than dragged along.

Lynn Wild
Littleborough U3A

Why 8?

Why does the second copy of Beacon News claim to be Edition 8? It’s because there have been six Beacon newsletters in various formats before Beacon News.



Beacon Finance

U3A treasurers come in all shapes, sizes and backgrounds. Some are chartered accountants, some are experienced book-keepers while others are enthusiastically adopting the U3A ideal of self-education. They all work hard and try to do the best job they can, but for the latter group it can be quite a struggle, especially with ever-increasing legislative and regulatory burdens.

The designers of Beacon faced a challenging task when it came to the finance module. It was unlikely to equally meet the demanding requirements of accounting professionals as well as those treasurers who are new to financial record-keeping.

The professionals are quite capable of looking after themselves. Some use their own favourite financial systems alongside Beacon, others enjoy the benefits that Beacon's integration of membership, groups and finance brings, mindful that it will make handing over to their successor easier.

But it's the others, the non-professionals, that need Beacon the most, and that has always been in the minds of the Beacon team. Simplicity is key. Beacon finance needs to be easy to set up, easy to use and forgiving. If a transaction is posted with the wrong date, or category, it should be capable of being corrected easily. This can make accounting professionals queasy, but it's very important that U3A treasurers don't face a complicated process to correct what is no more than a typo.

Beacon Finance is designed to be as simple as

possible - but no simpler. All U3As are unique, so it must be possible to set up your ledgers in a number of ways. This flexibility is necessary but can still be confusing. So what advice is available for new U3As when setting up the finance module?

The first port of call for new Beacon users, if the comprehensive Beacon User Guide can't answer your question, is your supporter. If they lack the finance expertise to answer you directly then they can call on the whole supporter team for help. New and existing users can also use the Finance section of the Beacon Users' Forum, where you can learn about Beacon finance from other U3A treasurers as well as the supporters.

Finally, the Beacon website now has its Training Guides section, with nine documents in the Finance section and a further one on finance in System Setup. Expect more to be added in the future.

Can you help?

Have you already set up Beacon finance, and got it working the way you want it? Then we'd like to hear from you. We're looking for examples of how U3As have set up their finance module so that we can learn from and share good practice and improve our guidance to U3As. If you'd like to help other U3As in this way then please contact us at news@beacon.u3a.org.uk.

Have Your Say

We hope you find Beacon News interesting, and we'd like to hear your comments. What would you like to see in Beacon News? Do you have any Beacon tips that might help other users? Can you help the documentation team by sending in your Beacon how-to and training guides?

Contact us at news@beacon.u3a.org.uk

