1. Introduction

You will be studying this document having Applied to use Beacon. You will know about many of Beacon's capabilities and tried out your dedicated Demoton Beacon site.

You have a Supporter to help you – often this will be the same Supporter who helped you reach your decision to adopt Beacon. Your Supporter will be your main contact with the Beacon Team and should be included in all communication.

A member of the Migration Team has also been allocated to you, they are responsible for your data and site creation and can help you and your Supporter with tools to assist with this.

The questions in this document are intended to help your U3A on the road to going live. You may well need to make changes to your current procedures and roles, and work on correcting and tidying up your membership and other data.

2. Site Administration

Beacon has two classes of users. System users are those such as the Membership Secretary, Treasurer and Group leader/convenors – they logon to Beacon to perform their roles. Beacon also allows U3A members to optionally have restricted access to check/update their details as held on Beacon and perhaps renew or even join online.

A Beacon site must have a special System user known as the Site Administrator (SA) and ideally a backup (with their own SA login). There are five principal areas of responsibility, "5 Gs", for the SA: -

Guardian - the SA has a duty to keep the data held on Beacon secure and to make other system users aware of expected good practice. This will necessitate review of the Audit Log from time to time and making occasional data downloads. The SA will also act as the point of contact with the Beacon Team once a U3A is 'Live'.

Gatekeeper - the SA controls system user access to Beacon by adding and disabling system user accounts, setting temporary passwords for new (or forgetful) users and assigning roles and access privileges of each system user i.e. what they can view, create, change, delete and download. In addition, the SA can help establish wider access to Beacon through the Members Portal, Groups list and Calendar

Guide - the SA ensures that system users are aware of best practice through working with others to provide formal and ad hoc training and advice. The SA is expected to keep up to date through active involvement in the Beacon User Forum and attendance at training/information 'events'.

Guru - the SA is the one person with access to all areas of Beacon. It is necessary to be a confident user of information technology with the ability to remain calm and help trouble shoot if/when problems arise. Previous experience with databases and a good working knowledge of Excel are desirable although not essential.

GDPR – U3As must have a General Data Protection Policy (GDPR) Privacy Notice/Policy that explains to their members all about how their personal data is collected, used, stored and much more. The SA is responsible for implementing their U3A's policy on Beacon. This includes setting up Beacon Users with appropriate roles and associated privileges and monitoring Beacon use through the Audit Log and Email delivery reports.

3. Procedures and Roles Considerations

Q 1. *Who will be your Site Administrator (name and email) as described above?*

Note – although the email address can be a personal one, best practice is to use a U3A generic address that would be adopted by future System Administrators (SA). This would also give future SAs full access to historical emails.

Q 2. *What months are the start of your Membership Year and your Financial Year?*
Both are required even if you are not going to be using the full financial functionality. It is important that these months are established now because changing them later is not straight forward – see below.

The start months determine the rollover of memberships and financial accounts. They can both be the same month, but some U3As find it useful to separate them so that subscription rate amendments can be approved at the AGM after the financial year end and well before membership renewals start at a new subscription rate. The day must be the first day of the month.

Note –
Beacon 'membership numbers' are 'for life' and cannot be changed at the start of a new membership year.

While it is possible for a U3A to ask for the Membership and/or Financial Year start dates to be changed at any time after migration (following a request to your Migration Supporter or the Ongoing Help team), please be aware that this will cause significant work downstream.

After changing the Membership Year, the 'Next Renewal date' in every Member Record will need changing manually. A change in the Financial Year can have significant consequences if Beacon has been used to reconcile Financial Accounts.

4. Data Considerations

Q 3. *Do you plan to submit any data for uploading to your new site in addition to Membership?*

Many U3As choose to simply migrate their membership data. You can also include **Venues**, **Groups** and **Financial Transactions**. If you choose not to submit any or all of these at this time, you can enter them by keying them in after migration. Be aware that a 'bulk upload' of data is only possible on initial migration.

Using Beacon for Finance can commence at the start of the next Financial year.

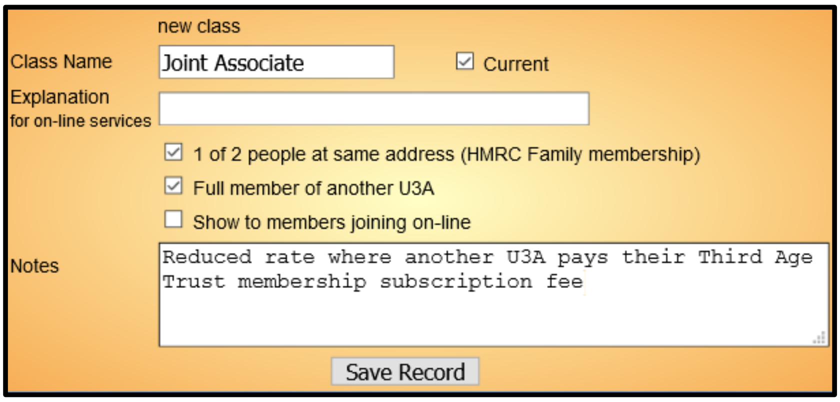
Note – without migrating **Financial Transactions** Beacon will have no record of membership fees that were paid before you went live. This also has implications if you claim Gift Aid (see Q 21).

Q 4. *What membership classes will you use?*

If you have one membership fee and everyone has individual membership then you just need the default class of **Individual.** The **Joint** and **Associate** classes also provided, but others can be added. New members will be assigned to the class of **Individual** by default. Other classes, such as **Reciprocal** or **Honorary** may also be appropriate for your U3A.

Note – the class of **Joint** enables a discount on the membership fee to be made to two people sharing a postal address. It also enables Gift Aid on the subscriptions of both members of a family, providing the member who is paying the joint subscription has consented to Gift Aid.

You can set up equivalent classes to **Joint** that are compatible with HMRC's rules on Gift Aid for Family Membership. To do this tick the box "1 of 2 people at same address (HMRC Family membership)" when creating the membership class as below. For membership classed in data you migrate to Beacon it is strongly recommended that the class name starts with "Joint" e.g. "Joint Honorary".



Q 5. *What membership statuses will you use?*
Default statuses of **Current**, **Lapsed**, **Resigned** and **Deceased** are provided. Others can be added for non-Current members.

Q 6. *Do you require any indicators (flags) associated with a member that are not an integral part of Beacon?*
For example, the need to identify members who want the Newsletter by post, members who wish not to receive Third Age Matters, or perhaps members who drive and can offer transport?

You can setup **Polls** – Yes/No fields associated with a member. Members' data can be filtered by Poll (and by Negate Poll).

Note – Your Site Administrator can create/delete polls at any time.

Q 7. *Do you have any free text associated with a member?*
There is a text **Notes** field for each member and this can be used to store comments, for example the special needs of a member.

You may have a requirement for specific information in addition to the ad-hoc Notes field. This may be useful in a download of member's data – perhaps information about a newsletter hand delivery round.

Named **Custom text** fields may meet such requirements but note you cannot select/filter on these fields. Discuss your requirements with your Supporter as relatively few U3As use them and there may be a better solution.

Note – Custom fields can be set-up after you have 'gone-Live' although you will need to contact your Migration Supporter or the Ongoing Help team.

Q 8. *Do you wish members who share an address to only receive one postal mailing?*
Beacon supports pairing members who share an address so they only receive one copy of TAM and only one mailing label is printed – in each case addressed to both members. The Migration Team have a tool to do this pairing for you.

Note – All the address fields must be an exact match in order for members to be paired.

5. If you are importing Venues and Groups data

Q 9. *Will you use the 'Faculties' feature to 'group your Groups' into sections such as Arts, Languages, Outdoor Activities etc?*
Will you use the term 'Group' and 'Leader' or something different for either/both of those? 'Convenor' has become a popular alternative to 'Leader'.

6. If you are importing Financial data

Be aware that most U3As don't populate Beacon with financial data and consider using Beacon for finance at the start of a subsequent financial year. The Knowledge Base section of the Beacon Help Centre https://u3abeacon.zendesk.com has several articles on Beacon Finance.

Q 10. *What Financial Accounts do you need?*
These are the accounts against which money is recorded. **Current, Membership** (and **PayPal** if required) are included by default, but others can be added. The account of **Membership** is the default for membership payments. **Current** will normally mirror your main banks account. You may also have e.g. **Social** and/or **Reserves** accounts.

Q 11. *What Financial Categories do you need?*
These are the categories against which you will allocate receipts and payments, and for reporting on your financial statement. Categories of **Membership**, **Donations** (and after going live **PayPal Commission** if appropriate) are included by default.

These three categories will be used for membership payments, donations and PayPal commission respectively and their titles should NOT be changed.
Others can be added – for example '**Stationary**', '**Speakers**', '**Room Hire**' etc.

Q 12. *Is the default first year of your accounts OK?*
The first year of Financial Accounts determines the earliest financial year you can produce a Financial Statement from Beacon. Your Migration Supporter will set this to be the financial year *before* the financial year of the date you go live. This is because Beacon allows you to enter financial transactions going back to the start of the previous financial year.

If you submit financial data for importing then the date of the earlies transaction determines the first year of Financial Accounts.

Note – your Migration Supporter will set this using these rules unless you advise otherwise.

7. Decisions implemented after migration

The settings for Q12 to Q15 need to be entered as soon as you go live before you can start to use Beacon i.e. renew or enrol members. You will be provided with a 'What to do Now' document when 'Live' to guide you through that process. Do prepare your answers in advance to avoid making hasty incorrect decisions.

7.1. Membership

Q 13. *What membership fees will apply for each Class of membership?*
Be aware that fees for **new** members can vary by month, usually to provide a discount for those joining later in the membership year (also see the next question).

Q 14. *From which month will you allow extended membership?*
Easiest to explain by example. If your membership year starts in August, then you may wish to allow **new** members joining in June or July (or even an earlier month) to pay the full annual membership fee. Extended membership effectively gives them complementary membership for the month(s) to the end of the July as well as membership for the following 12 months.

Note – this mechanism saves the administration of taking two lots of fees from a new member in a short period.

Q 15. *What will be your advance renewals period?*
You may allow renewals to start a number of weeks in advance of the start of the membership year. This will help spread out the administration workload and improve your cash flow.

Q 16. *What will be your grace lapse period?*
This is the number of weeks following the end of your membership year before members are flagged up as being lapsed.

Note – members are not automatically lapsed, the Membership Secretary needs to explicitly lapse them (have a look on your Demoton system).

Q 17. *What membership card colour would you like?*
This applies to all membership cards produced by the system. It is normal to change the colour for each new membership year.

7.2. System Users, Roles and Privileges

Q 18. *What other Roles do you need, to allow committee members and other key members to operate the system (Beacon System Users)?*
A number of 'suggested roles' with 'suggested privileges' will be set up for you. They are: **Group Leader**, **Groups Coordinator, Membership Secretary** and **Treasurer**. Your SA will be able to add more Roles with their associated privileges as necessary (see Q19)

Note – you can alter the privileges for each of the Roles (i.e. View, Create, Change, Delete) to suit your own U3A's requirements. Careful thought is required here e.g. you wouldn't allow those assigned the role of **Group Leaders** the capability to delete all financial data.

The SA role (with 'admin' as logon/username) will be established as part of site creation and this will have 'all permissions and more'.

Q 19. *Which of your members will become a Beacon System User, to carry out one (or more) of the Roles that you need?*
Your SA will allocate an informal username (logon name) to those of your members who will be Beacon System Users. Beacon generates a temporary password that the System User is forced to change after first logon. Usernames and passwords must not be shared-with/become-known-by anyone else. One or more Roles will need to be allocated to each User of the system.

Note – this usage is in addition to (if chosen by you – see Q21) any online usage of the system by your 'general' membership (to renew subscriptions, update personal contact details, view and/or join groups etc.)

7.3. Finance

Q 20. *What starting balances are to be applied to each Financial Account?*
These would typically be the balances which exist in each of your financial accounts at the time of migration and before any financial transactions are entered (including membership subscription receipts).

Note – U3As that don't use Beacon for finance can ignore starting balances.

Q 21. *Are you intending to claim Gift Aid on eligible membership subscriptions?*
Before enabling Gift Aid you must read the advice from the Third Age Trust and HMRC to ensure that your U3A is eligible to make Gift Aid claims. By enabling Gift Aid operation, you agree to accept full responsibility for the claims you make. The Gift Aid declaration produced by Beacon is not in itself evidence that a claim based upon it will be valid.

Note – Unless you migrate finance data with membership fee transactions, Gift Aid claims will only be possible for fees received after your Beacon site goes live.
In this case you will need to make a Gift Aid claim using your current processes up to your Beacon 'live' date – HMRC allow claims to be made for any period, they don't have to be full years.

7.4. Members' Privacy

Q 22. *Do you need to restrict visibility of members' contact details in Beacon?*
The Site Administrator and Membership Secretary need full access to members' data in Beacon to fulfil their roles. Beacon allows you to control the visibility of members' contact information to Group Leaders (Convenors). Two mechanisms are available:

1) The contact details (address, phone and email) of *individual* members can be hidden from Group Leaders though a tick-box setting on the member's record.

2) There is a global setting under System Settings "Hide address from group leaders" that hides the postal address of **all** members. The phone and mobile numbers will still be visible unless individual members have contact details hidden as in 1).

Note – Group Leaders are always able to see emergency contact details and can email members through Beacon (without seeing the email address).

8. 'On-line' considerations

Setting up on-line features can be done at any time after going live.

Q 23. *Will you use on-line joining for new members and/or on-line renewals for existing members?*
You will be sent a guide explaining what to do when your Beacon site goes 'live'. Essentially you need to set up a Charity PayPal account and link it to one of your existing generic (not personal) email addresses, e.g. treasurer@myu3a.org.uk. You also need to tell the Beacon team (Ongoing Help) that you are adopting PayPal as they will need to configure your site for PayPal usage.

Q 24. *What information do you want to provide through your website (e.g. links to on-line joining and to the member's portal to allow members to renew on-line, change their contact details online, view/join groups and/or view the calendar of activities etc.)?*

You should also consider what information you want to be visible through your website on groups.

Tip – investigate the 'Public link' menu entry on your Demoton site to see how this works.

Q 25. *What reference would you like to appear for on-line new member and renewal queries?*
This might be an email address, a phone number or post-holder in your U3A (e.g. 'Membership Secretary').

Q 26. *What wording would you like on the System messages?*
The System Messages are those generated for the email when a member renews on-line; the email when a new member joins on-line; and the Home Page notices.

9. General

Q 27. *Will you use a default Town, County and STD code?*
This can make data entry easier if most members have common values of Town, County and/or STD Code. The defaults can be overwritten.

9.1. Reminder summary

The following are already provided in the system: -

- **Individual**, **Joint** and **Associate** membership classes (different classes are mainly needed for different fees)
- **Current**, **Lapsed**, **Resigned** and **Deceased** for membership status

- Groups for activities
- Leader(s) for each group

- **Current** for the financial account associated with membership subscriptions
- **PayPal** for the account associated with online joining/renewals
- **PayPal Commission** for the financial category used for their commission
- **Membership** for the financial category associated with subscriptions
- **Donations** for the associated financial category.

NB. Those in blue should NOT be changed.

9.2. Lastly

Do talk all this through with your Supporter, so that any issues can be identified and resolved as early as possible

10. Version History

v3	13 Aug 2017	First formal issue	
v4	11 Sep 2017		Q3 removed, as new membership number each year is no longer an option Q11 modified to mention Rolling membership years
v5	2 Aug 2018		General update taking into account changes in procedures. Questions renumbered
v6	28 Oct 2018		Deletion of references to 'rolling membership'. Update of email to info@ Reorganisation/listing order of questions
v7	14 Aug 2019	Graham Tigg	Reformatted to current style Split into data and roles/process sections Made it more requirements than technical e.g. polls Extended some questions with more explanation. On the Financial year stated how it will be calculated by the Migration Team Added Privacy section and question. Added GDPR to System Admin intro. New question on pairing.
v8	23 Aug 2019	Graham Tigg	Refer to Site Administration rather than System Administration.
v9	10 Jan 2020	Graham Tigg	Made it clear that Joint membership requires member pairing in the data
v10	2 Feb 2020	Graeme Bunting	Q2: notes about changing Membership & Financial Years added. Q4, Q5, 9.1: Default Membership Classes & Statuses updated.
V11	12 Aug 2020	Graham Tigg	Added change to Finance – Membership a/c setup and fees (Q10).