How to… Transition to the new Gift Aid feature

This guide highlights the changes to Gift Aid recording and reporting in Beacon, introduced in August 2026. It only provides important advice on how to transition to these new features and explains the changes that have been made, with some key clarifications. It is not a comprehensive guide on how to set up Beacon to start using it for Gift Aid. Please refer to separate training and guidance if your u3a is new to Gift Aid.

Key changes

- Membership classes: Gift Aid eligible setting
- Email: new Gift Aid tokens
- Gift Aid declaration: wording change

Remember, Gift Aid is calculated ***at the time a transaction is created***. Any changes to the Gift Aid amounts in your membership class settings will **not** be applied to existing transactions. Only those completed after you have made the changes will use these new figures.

If your membership fee is only partially eligible for Gift Aid, to avoid confusion, we **strongly advise** that you create a Gift Aid claim **before** adding the correct figure to the new Gift Aid field(s). Manual adjustments can be made more easily in the spreadsheet, before you submit the claim, as the relevant amounts will be easier to identify.

Membership classes: Gift Aid setting

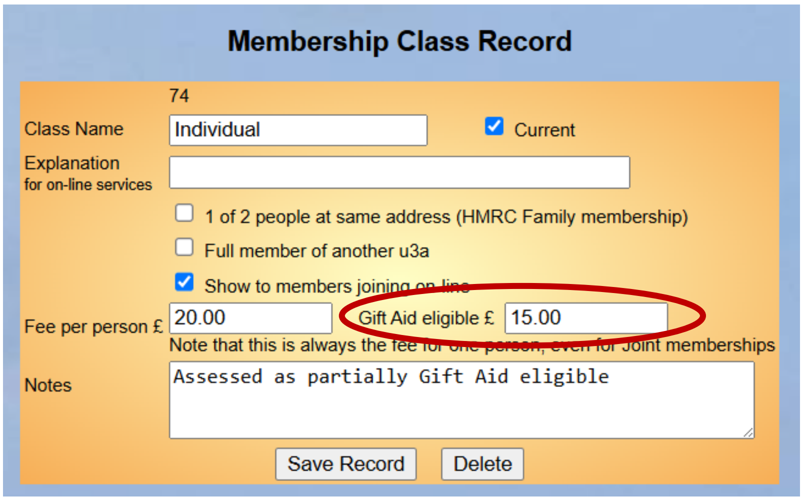
A new field has been introduced for you to specify the level of Gift Aid for each membership class. Beacon will calculate Gift Aid for each new transaction based on the Gift Aid field only. On all new transactions, the fee for each membership class is no longer used for Gift Aid calculations.

- Gift Aid cannot be higher than the fee
- Gift Aid cannot be zero
- Fees and Gift Aid are always per person. In a Joint membership (HMRC Family membership), the individual fee and Gift Aid figures will be counted twice to give the total.

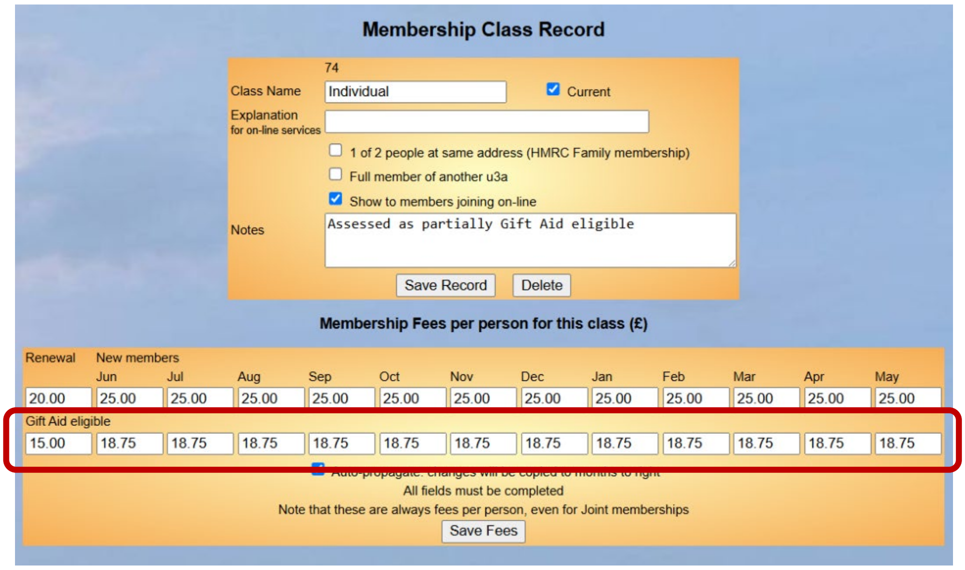
To make sure that there's no interruption in the collection of your Gift Aid records. For each membership class, the Gift Aid field has been automatically completed with the existing fee. There will not be any changes to the figures calculated by Beacon until you alter the Gift Aid eligible figure in the membership class record.

Changes to the Membership Class Record's screen

The interface for managing membership classes depends on the *System Setting* for fees: *Annual - same fees all year* or *Annual – fees vary by month of joining*. The two different views are shown below.



Annual - same fees all year



Annual – fees vary by month of joining

Donations: clarification

Beacon treats any donation that is added to a membership fee payment as fully eligible for Gift Aid, even if the fee itself is only partially eligible (and assuming there is a valid Gift Aid declaration).

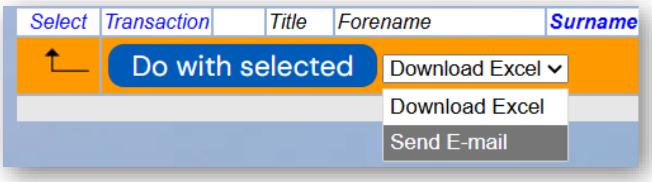
> *EXAMPLE*
> The membership fee is £20, of which £12 is eligible for Gift Aid. A renewing member, who has made a Gift Aid declaration, pays £35. Gift Aid can be claimed on £27 (£12 of the membership fee plus 100% of the £15 donation).

Gift Aid tokens and email

Organisations are required to provide information to their donors about how much Gift Aid has been claimed in their name. This information may be required for the donor's annual tax return.

The existing token #GIFTAID provides the date of the Gift Aid declaration, completed by the member. An additional token has been added: #GIFTAIDLIST

This provides a comma-separated list of Gift Aid amounts and the date of the transaction. You can use both tokens by creating an **email from the Gift Aid declaration screen**. Only transactions within the period selected will be listed.



Gift Aid declaration wording

The wording has been updated to clarify the position around "personal benefit", as outlined in the guidance issued by the Third Age Trust in March 2026.

There are two versions of this wording, with Beacon automatically displaying the correct one for you.

Fee is fully Gift Aid eligible

If the Gift Aid eligible amount in Beacon's settings is the same as the membership fee, the following declaration (with example data) will be displayed:

GIFT AID
Are you a UK taxpayer? Through Gift Aid, we can reclaim the tax of 25p for every £1 of your donations and eligible membership subscription.
The membership fee is £20.00 and we can claim Gift Aid on this amount. This pays for membership of this u3a only and does not give you the personal right(s) to use facilities or services provided by this u3a. Some interest groups may incur costs which need to be covered by the members of those groups.

o I am a UK tax payer and wish to Gift Aid this and all future subscriptions and donations that I make to Anytown u3a, unless I notify you otherwise. I understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay any difference.

o I do not wish to Gift Aid my subscriptions and donations.

Please notify us if you:

- want to cancel this declaration
- change your name or home address
- no longer pay sufficient tax on your income and/or capital gains

If you pay Income Tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid donations on your Self-Assessment tax return or ask HM Revenue and Customs to adjust your tax code.

Fee is partially Gift Aid eligible

If the Gift Aid eligible amount in Beacon's settings is less than the fee, the following declaration (with example data) is displayed:

GIFT AID

Are you a UK taxpayer? Through Gift Aid, we can reclaim the tax of 25p for every £1 of your donations and eligible membership subscription.

The basic **membership fee is £28.40 and we can claim Gift Aid on this amount**. An additional fee is also required to cover the costs of interest groups and services provided.

o I am a UK tax payer and wish to Gift Aid this and all future subscriptions and donations that I make to Anytown u3a, unless I notify you otherwise. I understand that if I pay less Income Tax and/or Capital Gains Tax than the amount of Gift Aid claimed on all my donations in that tax year it is my responsibility to pay any difference.

o I do not wish to Gift Aid my subscriptions and donations.

Please notify us if you:

- want to cancel this declaration
- change your name or home address
- no longer pay sufficient tax on your income and/or capital gains

If you pay Income Tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid donations on your Self-Assessment tax return or ask HM Revenue and Customs to adjust your tax code.

Joint membership: clarification

This section provides clarification about joint membership but there have not been any changes in Beacon.

Terms used

Joint membership - membership class with the setting *1 of 2 people at the same address (HMRC Family membership)* ticked. The cost of the joint membership must also be ***less than the cost of two individual memberships***. If **both** of these conditions are not met, the membership class does not comply with HMRC's requirements for *Family membership*. Beacon assumes that you have set up joint memberships correctly.

Paying member – this means the new or renewing member who is completing the online joining form, that is the first member's details. For renewals, either member can click to renew for both members, regardless of who originally completed the form. For renewals completed by the membership secretary within Beacon, this is the first person selected for a couple.

How Gift Aid is calculated

When two joint members renew or join, only the paying member's Gift Aid status is relevant. If s/he completes the Gift Aid declaration, or has previously completed one that is still valid, the Gift Aid eligible amount for both memberships is recorded in the transaction. This total Gift Aid amount is recorded against the paying member only.

> No check is made, or is required to be made, about the name on the credit card, bank account or other payment method (HMRC Gift Aid guidance 3.32.2). For joint (family) memberships, you can assume that it's the paying member's own funds that they're using.

If the paying member has **not** made a Gift Aid declaration, none of the membership fee is eligible for Gift Aid, even if the non-paying member has a valid Gift Aid declaration on record. None of the total amount paid will be included in the Gift Aid record created in Beacon.

To complete transition to new Gift Aid features

To provide continuity, the full fee has been automatically added to the Gift Aid field. If you want Beacon to calculate Gift Aid on membership fees that are partially eligible for Gift Aid, please adjust each Membership class record.

If your u3a fee is only partially Gift Aid eligible

1. Save existing transaction data.
   a. Download a copy of all unclaimed Gift Aid transactions (through the *Gift Aid declaration* option under *Finance*). Make sure you select today's date in the To field, so that you include all existing transactions and then mark as claimed.
   b. Save the file to a secure folder so you can easily find and identify it.
2. Go to each membership class record and add the relevant Gift Aid figures. Remember to click Save!

You will need to make the usual required manual adjustments to the existing Gift Aid claim figures you have just downloaded eg changing the Gift Aid amount to be the partial level rather than the full fee.

> Do not use the token #GIFTAIDLIST for the old (existing) transactions. This would provide the wrong information to donors as the full fee would be shown as claimed, rather than your manual adjustment.

You can submit your Gift Aid claim now or, if you're in the middle of renewals, you may want to hold it for a few weeks and add the new transactions to it.

All transactions created after you added the new settings will have the correct Gift Aid figures. You will not need to make manual adjustments to reflect partially eligible membership fees.

If your u3a fee is fully Gift Aid eligible

1. Use the *Gift Aid declaration*, from the *Finance* list, in the usual way.

Further reading and help

- Gift Aid Guidance March 2026 – published on the Third Age Trust's website in the Members' Area
- Beacon guide: 7.8 Gift Aid
- HMRC Gift Aid guidance

You can raise a Beacon support ticket by emailing: info@beacon.u3a.org.uk