

Beacon Workshop 27th April 2017 held at The Genesis Centre Parkgate.

Run on behalf of the HSCN by Nick Hammond from Warsash U3A

Attendees

Sally Ingledew	HSCN Manager	scnmanager@gmail.com
Angela Chapman	Waterlooville	WU3A.chapman@virginmedia.com
Ray Gardner	Locks Heath	raygardner@clara.co.uk
Mark Dancey	Waterlooville	markdancey@live.co.uk
Kevin Stock	Waterlooville	chairman@waterloovilleu3a.co.uk
Sheila Simpson	Stubbington	Sheila.simpsonU3A@yahoo.co.uk
Yvonne Apperley	Stubbington	Yvonne.apperley@sky.com
Sheila Dawson	Stubbington	Sheiladawson40@gmail.com
Mike Smith	Solent	Web.solentu3a@gmail.com

Apologies from Gosport and Portsmouth

As this is a report it will be itemised

- Beacon and membership cards.

Beacon membership cards have a barcode. Can be scanned into Excels/sheet at meetings. Scanner £15 from ebay. Warsash provided lanyards and cardholders for all members. Approx 95% takeup. If forget enter to Excel manually. Print out on paper, 10 per page, or fewer if needed,

- Beacon and security

Very secure. No data is held on any personal device unless the decision to download some is made. When log in pathway to server is encrypted SSL. Same as online banking security. Server data is encrypted. Backed up on -site and offsite every 24 hrs. Responsibility for security taken by Beacon. Mike Smith queried whether data was cached.

- Siftware

A professional company to ensure the system keeps going. Are involved in bug fixing and later development. Happy to work with volunteers.

- Contacts

Beacon team/first contact through support@beaconu3a.org.uk (Lesley Asman)

Queries through Regional Support Teams for SE beaconserst@gmail.com Problems can then be passed to supporters, other regions. Technical problems particularly the Users Forum accessed from Demo system/live systems. This is reviewed by the Beacon Team.

- Using the Demo system

Access ideally through Lesley Asman support@beaconu3a.org.uk but can search for demo beacon. Demo is the view the administrator will have. Specific views for different roles. Privileges can be assigned to roles. Easy to change, but committee should decide on these. If eg Group Leaders are not very IT literate details can be downloaded to excel and unwanted info deleted. If GLs email from Beacon they only see address and tel number.

- Emails and Beacon

No limit on number. Can easily be personalised from drop down menu. Can check status dispatched, delivered, opened. Occasional non deliveries, but rare. If fails or goes to Spam highlighted in red. Easy for GLs to see who is on email.

- Renewals

Members numbers are always the same, and are not recycled. Eg if lapse can come back years later to same number. Must set renewal date.

- Members portal

Provides access for all members to their own personal details which they can alter. Also access to all groups times and venue, taken from groups info. And calendar for other events.

- Members data/migration

It is only the membership details that are migrated. Many U3As start just using the membership package, and go on to include Groups and Finance later. U3As choose time to migrate. Usually at least busy time of year. See also starting with membership only.

- Training documents

Beacon team are planning to produce documents to help U3As train committee members to use Beacon. In fact it is getting more user friendly. There is also support from the beacons user group.

- Finance

Membership fees go automatically into the ledger. Have to add other transactions to balance with bank statement. Paypal can be used goes straight to ledger. Costs approx. 2.5% business rate. BACS must be entered manually. Charity must be done at the beginning cannot be changed. Statements can be downloaded. Gift Aid form can be generated, but format has to be changed for HMRC. Also easy to keep records of group finances as ledgers can be set up and selected by category. Can run more than one account.