



yorkshire
and
humber
region

yahru3a.co.uk

SHARING BEST PRACTICE WORKSHOP

Purpose

To share your issues and concerns and also to learn about other U3As who have examples of good ideas that work well for them.

The 'Beacon' system, Frank Bailey Ripon U3A

Web software for managing U3A membership, activities etc.

Membership Systems

Yorkshire and Humberside

24th November 2017

What do we mean by Membership System?

Standard Membership System Functions

- Database of members
- Join/Renew and pay online
- Mass Email
- Export list for labels
- Register and pay for events
- Reports

Features designed for U3A

- Advertise and manage interest groups
- Manage waiting lists
- Members can join groups online
- Book keeping for Treasurer
- Permissions system tailored to U3A roles

Wider Influences on Choice

- Attitude to technology and the future:- conservative, in the middle or innovative
- Technical Skills within U3A
- What the neighbours are doing
- Attitude towards price
- Sustainability of Supplier

Membership Management Systems

- Wild Apricot

Cost: 70p - £1.20 per member per year.

- WebIntegrate (Simple Membership)

Cost: Sliding scale based on number of members no details published yet.

- U3A Web

Cost: £399 per annum for 400+ members. (less for fewer).

- U3A Beacon System

Cost: 50p per member per year.

U3A Beacon System

- Developed by: U3A Volunteers
- Currently Used by: 100 U3As using system
- 35 U3As waiting to use
- Key Features: Tailored to U3A use. Includes a sub-system for Treasurers. Very good user acceptance
- Missing features: Event Registration, Membership Fee add-ons etc included on a future development list
- Impact on current website: None. Add links from current website
- Support: Regional Support Groups and via online User Forum
- Cost: 50p per member per year from April 2017

U3A Beacon System



Third Age Trust

- The Trust has committed to facilitating the future of the system on behalf of U3As using it.
- Day to day management of the Project is undertaken by the Beacon Team.
- The project should be self financing by the end of 2017. Any surplus will be used exclusively for the project.

Future Development and Support

- Siftware has been appointed to maintain and develop the system.
- Subscriptions from user U3As will be used to pay Siftware.
- The system is being configured to allow volunteers to share in the development.
- A User Group is being formed to influence the future direction of the System and the priority for adding new features

Key Components

- Membership data
- Integrated financial accounts
- Group organisation
- Communications
- On-line services

Key Components

- Membership data
 - Personal records
 - Configurable membership classes and fees
 - Renewals (manual and on-line)
 - Export addresses for TAM, labels, Excel, CSV, etc
 - Membership cards
 - Expiry management

Key Components

- Integrated financial accounts
 - User-defined accounts and categories
 - Inherent double-entry book-keeping
 - Automatic entry of membership fees
 - Simple reconciliation of bank statements
 - Credit batches
 - Financial statement download
 - Gift Aid declaration

Key Components

- Groups organisation
 - Group details
 - Schedule
 - Calendar of events
 - Members and leaders
 - Venues and faculties
 - Group accounts

Key Components

- Communications

- E-mail members, group members and leaders (individually or in multiple)
- Standard messages
- Customisable system messages

Key Components

- On-line services
 - Membership applications
 - Membership renewals
 - Live groups list
 - Live calendar

Priorities

- Secure system
- User-friendly
- Customisable by U3A and user
- Special attention to e-mail specification
- Maintainable

Moving to Beacon

- **1. *Investigate Beacon***
 - Sign up for Demo System: send email to
 - migrate@U3ABeacon.org.uk
- **2. *Get Committee Agreement***
- **3. *Apply for Beacon***
 - Download application form from Demo home page
- **4. *Get a Migration Supporter***
 - He/she will work with you to:-
 - Discuss “problem” areas where Beacon might not fit
 - Work with you to shape your data ready for loading
 - Support you as you start using the system