A GUIDE TO BEACON FOR CONVENORS

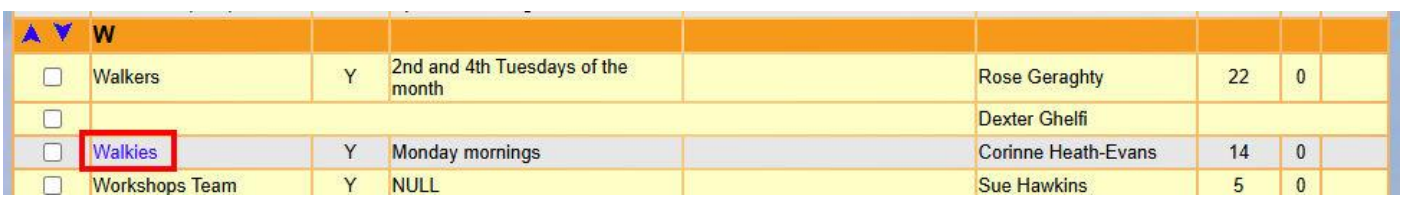
The Groups Coordinator will issue the Convenor with an administration login and password on Beacon which is different to the normal members login, with a separate URL (link for access).



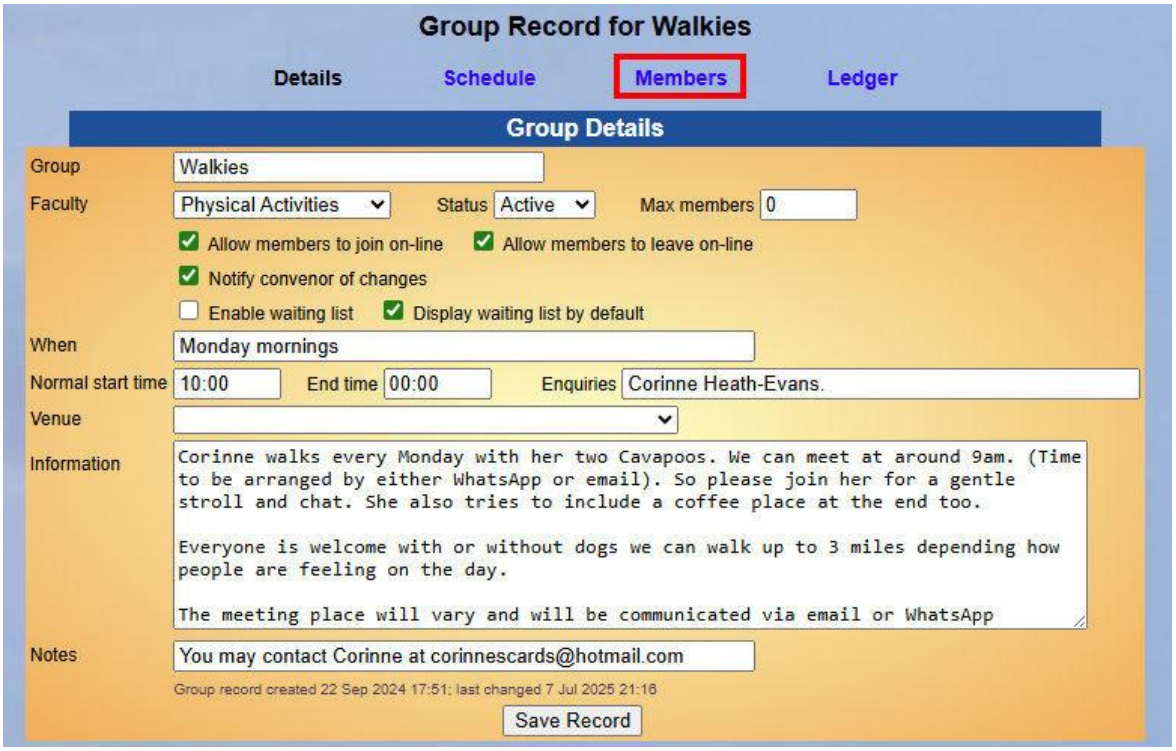
Once you enter your Convenor 'username and password' you get an opening screen with your name showing where the red box is:



Click the blue 'Groups' and you will get a list of all the groups, but the ones where you are Convenor will have the group name highlighted in blue.



In the example above, Corinne is Convenor for Walkies which is highlighted in blue. If you then click on the 'Walkies' link you get:

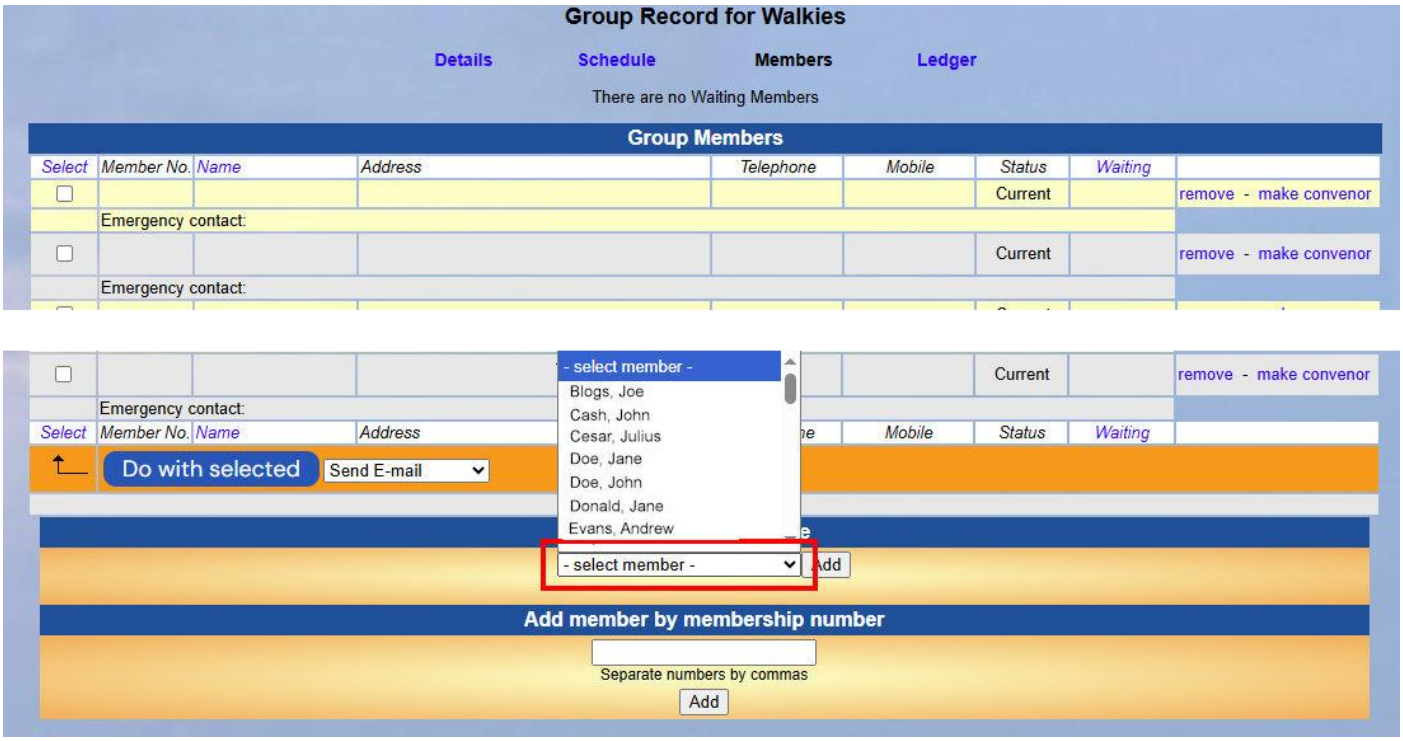


This is initially set up by the Groups Coordinator but can be edited by the Convenor.

When you select the 'Members' option as highlighted on the previous picture, it gives a list of group members:

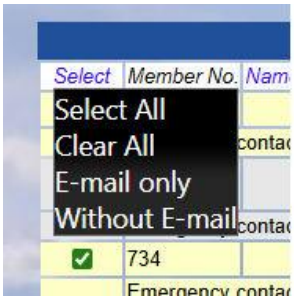


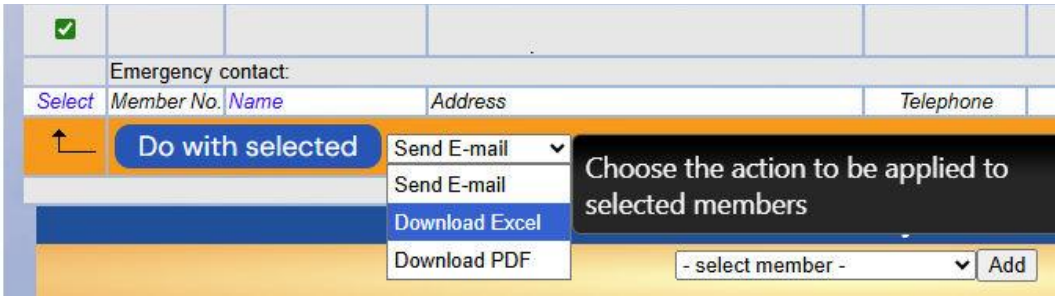
This has been edited to remove members personal details.



As Convenor, you can add members details by clicking the 'select member' option and it brings up a list of all the Wheathampstead u3a members and you can scroll to select the one you want.

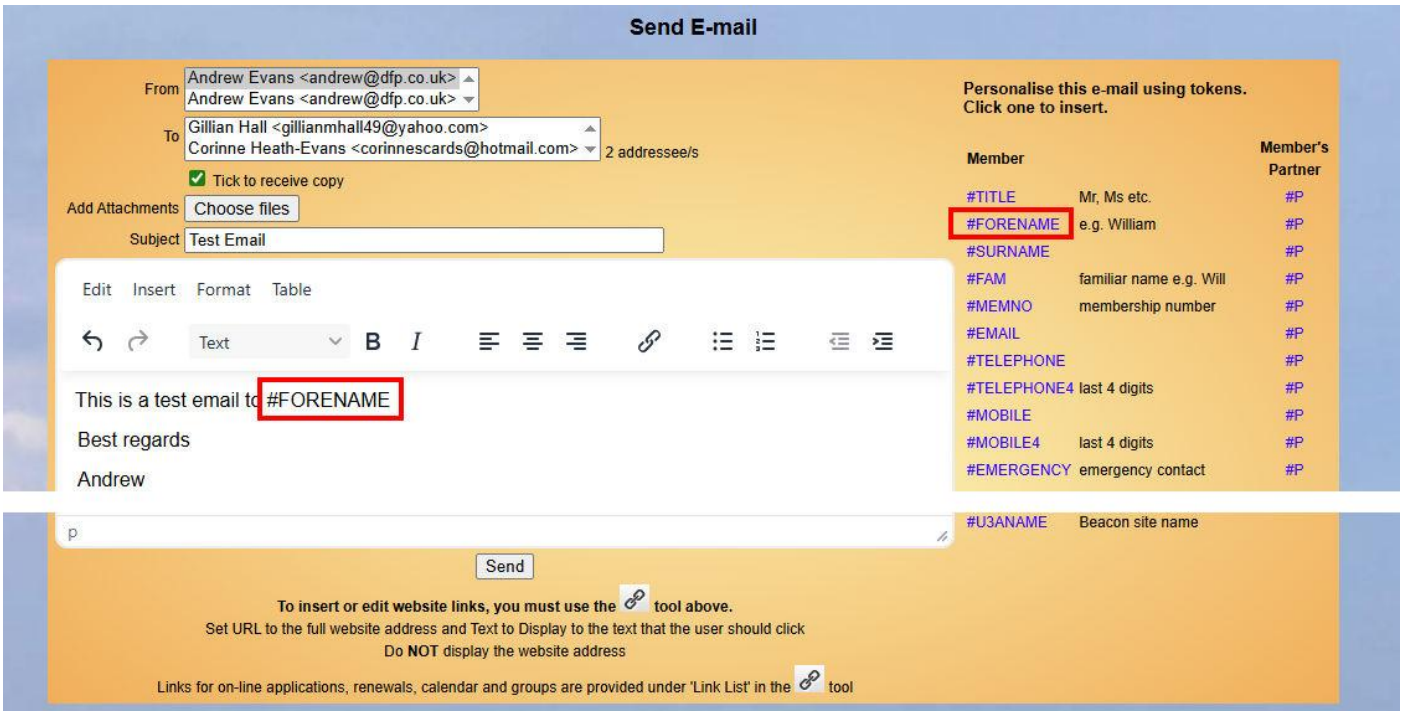
Once you have added the members you can contact some or all of the members as well as download data.





In the top left corner, there is an option to 'select' and if you click this it gives you the option to select or clear etc. If you 'select all', green ticks appear and then at the bottom of the page there is a box 'Send E-mail' with other options too. You select what you want to do and then click the blue button, 'Do with selected'

If you want copies of the members details you can export to a PDF file that can then be printed. It is recommended that Convenors download and print the PDF to have all the members details including emergency contact numbers.

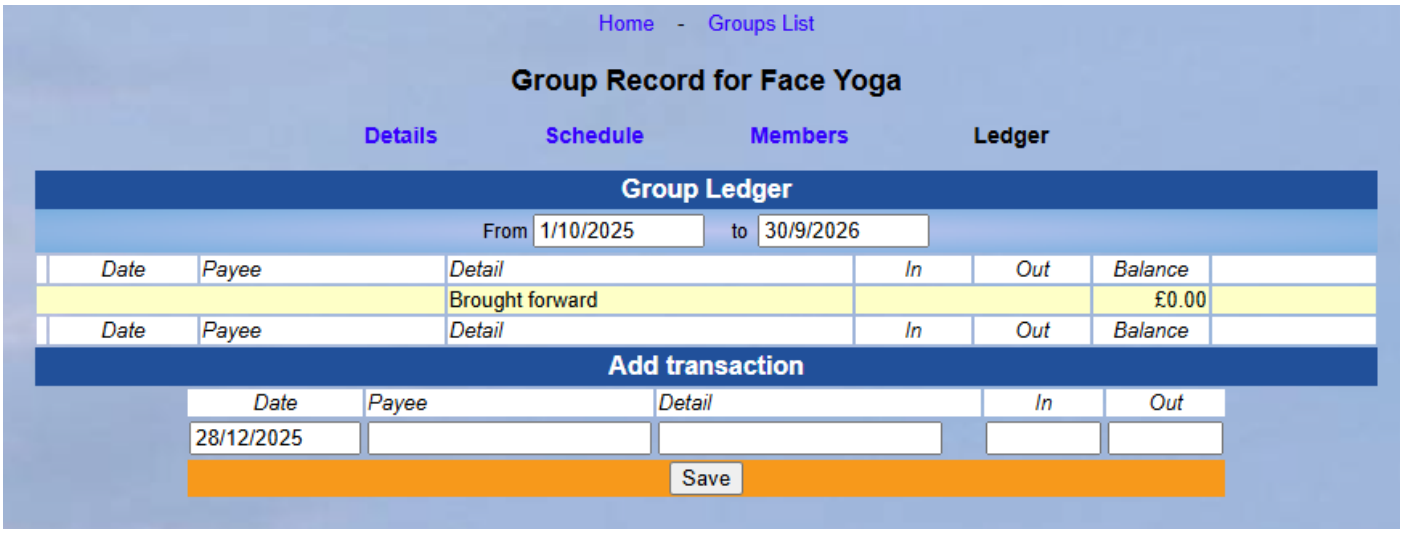


If you select 'Send E-mail' it takes you to an email screen where you can compose a message to be sent to the selected members. The recipient cannot see who else has been emailed. You can tick a box, so you also get a copy of the email.

You can personalise the email by selecting the tokens on the right-hand side so the first line when sent to Gillian will say 'This is a test email to Gillian'.

Once the group has been set up, the Convenor is an essential group member, as they are the focal point for the group, for communication within the group and they act as the group's link to the u3a committee.

- If members pay money, that money must be collected in advance and if it is paid into the u3a, must be recorded using the ledger facility in Beacon.



To enter a payment, go into your group and select 'Ledger'. Add the information and save it.

- The convenor will then pay all the collected money (minus expenses) into his/her own bank account (or keep it, if in cash) and then pay the equivalent amount into the U3A account via bank transfer. This should be done on the same day as monies are collected, or as soon as possible thereafter. A detailed record of all expenses must be kept.

- The total sum paid must be given to the Treasurer and not just the sum for the room hire or other expense. A Convenor should not keep any money paid by members in their personal account, transferring everything to the u3a bank account. This is important for transparency, in the event of an audit.

- At the treasurer's discretion, room hire costs may be paid quarterly.

- Members who have paid in advance must not expect a refund if they miss a group meeting

- If a group is responsible for room hire costs, ideally, these should be paid by the group members six months in advance. This should be done in April and October to align with the u3a's financial year (which begins in April).. This is to cover fixed costs such as room hire.

- If something special is happening which would be of interest to members or another group, then put this on the website, via Website Officer. Also let the Communications Officer know, so that this can be publicised.

- Once a year, in March, confirm membership and activities with the Groups Coordinator and ensure the Group is represented at the 'Meet the Groups' session after the AGM.