

**SCN Treasurers Meeting**

**Tuesday 28<sup>th</sup> April 2026 10am**

**Attendees**

Kevin Stock	SCN Manager	
Sally Ingledew	Council Rep	
Tony Luetchford	Treasurer	Botley HE & District
David Jackson	Committee	Guernsey
Ray Beadell	Treasurer	Havant
Patricia King	Treasurer	Horndean & District
Phil Stannett	Treasurer	Locks Heath

**Apologies from:** Emsworth, Gosport, Portsmouth, Rowlands Castle, Warsash, Waterlooville

**1. Welcome** by Kevin Stock, SCN Manager

Permission was received to record the meeting for the purpose of producing this report.

**2. Introductions** All attendees introduced themselves and said which role(s) they performed.

For this meeting I turned on Zoom's AI Transcribing facility, and this is the report that it produced (after minor corrections by myself).

**Meeting summary**

**Quick recap**

This meeting was a treasurer-focused discussion group where participants shared experiences and best practices using Beacon, a financial management system for U3As. The main topics covered included how different U3As utilise Beacon's financial features, gift aid procedures, membership portal usage, and payment methods. Participants discussed the pros and cons of using Beacon versus spreadsheets, with some finding

Beacon lacking in flexibility for detailed reporting while others found it effective for managing both membership and financial data. The group also addressed gift aid claim processes for joint memberships and explored the potential for regional network implementation of Beacon. Additional topics included the use of digital services, domain name costs, and the challenges of managing digital documentation securely.

### **Next steps**

- Kevin: Follow up with regard Gift Aid claim rules for joint memberships, especially confirming whether Gift Aid can be claimed for both members when only one has submitted a Gift Aid declaration.

*Post meeting note: Gift Aid CAN be claimed on the whole amount for Joint membership, even if only one person can give GA. (See section 5.2 in the 'Third Age Trust – Gift Aid Guidance' updated in March).*

- Phil: Investigate the possibility of transferring Locks Heath U3A's domain and generic emails to Google Workspace for Nonprofits to reduce costs and improve email management.
- Sally: Bring up the suggestion of group purchasing or central support for domain names and generic emails for U3As at the next relevant regional or national meeting.
- Ray: Consider attending a Beacon Portal startup session to learn about implementing online membership renewals via the Beacon Portal.

### **Summary**

#### **U3A Meeting Attendance Discussion**

The meeting began with introductions. Ray from Havant U3A reported having about 380 members, while Tony from Botley Hedge End U3A shared they started about 2.5 years ago with similar membership size. The group noted that only five U3As were present at the meeting, which was discussed as a lower attendance compared to usual. Kevin requested permission to record the meeting, which was granted by all participants, and the meeting continued with introductions from the attendees.

#### **U3A Regional Treasurers Meeting**

The meeting began with introductions from council representative and treasurers from various U3A regions. David introduced himself as a committee member from Guernsey U3A, set to become treasurer at the upcoming AGM in July, with a background in accounting and financial management. Ray joined to discuss his experience using spreadsheets instead of Beacon, expressing interest in understanding its advantages.

Patricia shared her experience as a treasurer for about two years and mentioned reviewing updated Gift Aid advice.

### **Beacon System Usage Discussion**

The meeting focused on discussing Beacon system usage across different U3As. David shared his challenges with the financial aspects of Beacon and sought insights on how other U3As utilise the system. Tony from Botley U3A reported using Beacon for all financial processes and producing reports for committees, though they use a cash basis rather than accrual. Ray from Havant U3A expressed difficulties with Beacon's flexibility compared to their existing Excel spreadsheets, particularly for drilling down into financial data. Phil from Locks Heath U3A demonstrated how they use Beacon's group functionality and discussed their approach to handling early payments through separate accounts. The group also discussed Gift Aid procedures, with Phil sharing insights about claiming Gift Aid on joint memberships. David mentioned that Guernsey U3A successfully uses the Beacon portal for membership renewals, with approximately 60% of their 1,000+ members using it.

The meeting was asked if any U3A has stopped accepting cash or cheques, and no U3A has. The conversation ended with a discussion about potentially getting all Southeast Region U3As onto Beacon and exploring digital services, including the possibility of using Google Workspace for nonprofit organisations.

SCN Website: <https://scn.u3asite.uk>

SE Region Website: <https://southeast.u3asite.uk/>