

# Cheltenham u3a

We learn, laugh and live because we exist for members by members.

## CLUSTER SUPPORT

### DEDICATED EMAIL ADDRESSES:

Cluster Supporters and Admin: [clusters@cheltenhamu3a.org.uk](mailto:clusters@cheltenhamu3a.org.uk)

Cluster Administration: [clusteradmin@cheltenhamu3a.org.uk](mailto:clusteradmin@cheltenhamu3a.org.uk)

### ROLE OF THE u3a GROUPS CLUSTER SUPPORTER

1. **New Groups** - Help prospective leaders to start their group (more below \*).
2. **Group Leader Support:** Support existing Group Leaders (*when they ask for help.*)
3. **Communication & Liaison:** Act as a link between Group Leaders and the broader membership. (*Help if members have questions about Groups.*)
4. **Administration:** Maintain an accurate, up-to-date list of all active groups, their leaders, and their meeting times and waiting lists within your Cluster on Beacon. (*The list exists. It just needs to be kept up to date.*)
5. **Venue Management:** Help identify local venues for group meetings. (*The list exists, but members may come up with new suggestions.*)
6. **Contact with the Cluster Administrator (CA):** pass any relevant information to the CA on a monthly basis, by the 7th day of the month, to share with the Committee.

### \*NEW GROUP DEVELOPMENT

#### A step by step explanation of how Groups Cluster Support and Administration works.

1. A u3a member wants to start a group.
2. The member contacts the CA, *The Magazine* editor and web manager.
3. The CA sends contact details of the new GL to the appropriate CS.
4. CS contacts the GL and offers support.
5. GL has sufficient members to start a group.
6. GL informs CS
7. GS sends GDPR form to GL. GL returns form.
8. CS informs CA, editor and web manager that the form has been received.
9. Information is added to Beacon, *The Magazine* and website.
10. CS emails document bundle to new GL.
11. CS informs CA that Group is up and running.

## FLOWCHART: NEW GROUPS DEVELOPMENT



## ROLE OF THE CLUSTER ADMINISTRATOR

1. First contact with new Group Leader
2. Pass the above information to appropriate Cluster Support
3. Get information from the Cluster Supporters once a month, during the first week of the month and report to the Committee, second Tuesday of the month, written or in person.
  - New Groups
  - Groups without leaders
  - Waiting lists
  - Possible difficulties
4. Ensure that Beacon is kept up to date
5. Meet with Cluster Supporters when they request.
6. Have a meeting with all Cluster Supporters once a year, ideally shortly after the AGM.

## Beacon for new cluster roles

This note summarises how the roles of Cluster Supporter and Cluster Administrator interact with Beacon.

### Overview of access

#### Groups Cluster Supporter

Able to view, add and edit groups and send emails.

#### Groups Cluster Administrator

Able to view, add and edit groups and send emails.

### Details of permissions to be given

Access to individual Clusters is through **Groups** from the **Home** tab in Beacon. **Instructions** on how to access your Cluster (called Faculty on Beacon) are below.

<b>Groups Cluster Supporter (Non-committee role)</b>	<b>Groups Cluster Administrator (Non-committee role)</b>
View groups list showing leaders	View groups list showing leaders
Create groups	Create groups
Send emails to group leaders	Send emails to group leaders
View and edit details of groups and list of group members	View and edit details of all groups and list of group members
Send emails to members of a group	Send emails to members of a group
View and edit group ledgers	View and edit group ledgers
View venues	View and edit venues

### Support

The Beacon Administrator can advise the Cluster Supporters and Cluster Administrator on **Beacon** as needed. [beacon@cheltenhamu3a.org.uk](mailto:beacon@cheltenhamu3a.org.uk)

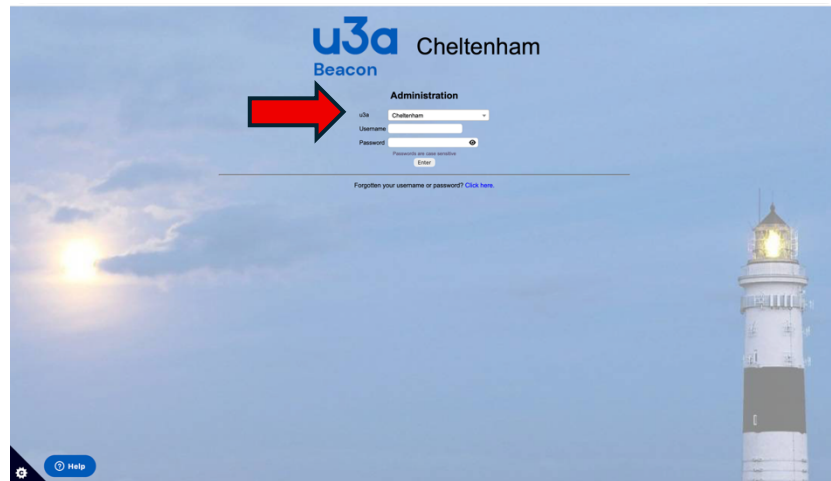
### How to access Beacon and your Cluster (called Faculty on Beacon)

1. Go to [u3abeacon.org.uk](http://u3abeacon.org.uk) (clicking on this link will take you to the web page. *If you are a first-time user click onto your specific u3a's Beacon login page, click **Register**, enter your exact membership details (name, membership number, postcode, and email), create a password, and follow the verification link sent to your email.*
2. If you have registered before you will need to use the dropdown menu to find Cheltenham, then fill in your username and password. *If you don't want to use the*

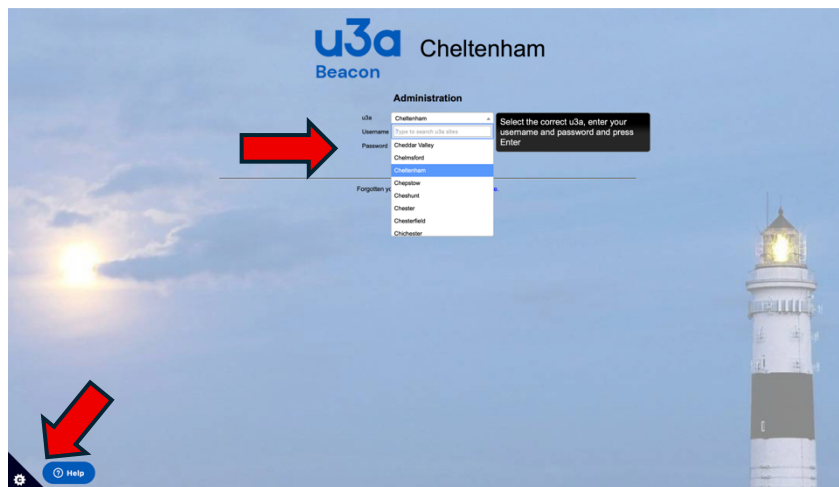
drop-down menu every time you access Beacon, click on the C in the black triangle in the left-hand bottom corner. It may take a few logins before the system remembers you.

3. The next page takes you to a notification about Gift Aid. Click anywhere outside of this notification to take you to the Administration page.
4. Click on Groups.
5. Click on Faculty.
6. Click on your own Faculty which we call Cluster
7. From there you can access the different Groups, the Leaders etc. in your Faculty/Cluster

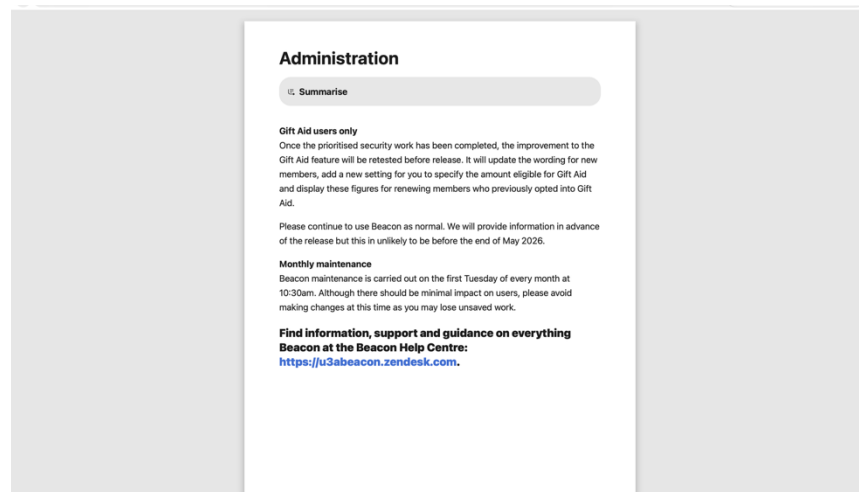
1



2



3



4

**Administration**

You are logged in as Leone Meyer [Log Out](#)

<b>Membership</b>	<b>Groups</b>	<b>Finance</b>	<b>Misc</b>	<b>Set up</b>
Members	Groups	Ledger (by account)	Audit log	System users
Recent members	Venues	Ledger (by category)	u3a Officers	Roles and privileges
Statistics	Calendar	Ledger (by group)	E-mail delivery	Finance accounts
		Financial statement	Personal preferences	Membership classes
				Poll

[u3a Beacon Users' Forum](#)    [Beacon User Guide](#)    [Beacon Website](#)

Hover mouse over captions for more information

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Home

**Groups**

Faculty   Show active only

**i** Operations at bottom of page

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

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Home

**Groups**

Faculty   Show active only

- ✓ - any or none -
- Active/Sports Groups
- Art and Specialist
- Books and Music
- Games Science and Discussion
- Languages and Social

**i** Operations at bottom of page

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Active	When	Where	Leaders	Members
Y	NULL		Elizabeth Boyes	

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Home

**Groups**

Faculty   Show active only

**i** Operations at bottom of page

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Select	Group	Active	When	Where	Leaders	Members	Max	Waiting
▲ ▼	<b>A</b>							
<input type="checkbox"/>	Art 1	Y	1st & 3rd Fri 10am	Highbury Church, Oxford Street	Jean Dormon	19	0	
<input type="checkbox"/>	Art Appreciation 1	Y	3rd Thursday at 14:30	St Matthew's Church	David Addison	48	25	
<input type="checkbox"/>	Art Appreciation 2	Y	3rd Friday at 10:30	St Matthew's Church	David Addison	1	25	
▲ ▼	<b>D</b>							
<input type="checkbox"/>	Drama (Tuesday)	Y	First Tuesday of Each Month 1.30 pm to 3.30 pm	Playhouse Theatre	Cliff Cocks	8	16	