Dear all,

Please see below information about recent changes on Pelham.

Contents

Main updates this month are:

- Branch Fee 2023
- PELHAM scheduled downtime Thursday 15th September
- Update on the Events module
- Additional email Branch email addresses
- Checking Memberships, renewals and expired memberships – reminder
- System Issues / Support

Branch Fee 2023

If you wish to change your Branch fee for 2023, either the amount, remove it or start to charge one, please can you let us know via the PELHAM support portal BEFORE THE END OF OCTOBER. Otherwise you risk members who renew early not being charged in line with your other members.

Click here to submit your request: https://ponyclub.atlassian.net/servicedesk/customer/portals

PELHAM scheduled downtime Thursday 15th September

Due to us getting ready to roll out improvements to PELHAM we are going to need to take PELHAM offline for around 4 hours on Thursday 15th September from 9:30am until early afternoon.

This will include all staff, volunteers, Centre Proprietors and Centre Coordinators, and no membership being taken via the portal over this period.

Systems impacted: PELHAM, Pony Club Portal – Both will be unavailable during planned downtime.

Event Module update

Overview

As we hope most of you are aware, we are currently working on the development to replace the current Event system, managed via Unity. However, we know many of you already use other entry system providers. As a result, the approach we have taken is to integrate PELHAM with some of the widely used entry systems already developed and available across the UK. The 4 who have, we believe, the necessary functionality, the drive to support The Pony Club and willingness to develop the integration required are (in no particular order): EntryMaster, Horse-Events, My Riding Life and HorseMonkey. We are engaged with all 4, but only EntryMaster are actively testing with us currently. H-E, HM and MRL will come on later in the year.

What will the process look like?

In summary:

- a "shell" event (such as rally, badge rally, test training, test, social event, local competition, sundry) containing basic event data will be automatically created directly in PELHAM from the event created in the entry system.
- When bookings are for a Member-only event, then the membership will be checked at the time of booking and if they are not eligible to enter, a message returned to advise them how to renew their membership or join The Pony Club (similar to what is used with Horse-Events for Championship entries).
- Once the event has happened, a further automatic upload of those attending the event will be made from the entry system into Pelham, so we have a full list, by event, of those who booked and attended.

- This can then be updated after the rally by the Branch, which triggers an automatic update on their record of the badge/test achieved and rally attendance.
  - If a rally remains updated after a period of time, it will be closed automatically and the member achievement record updated.

Below is a picture of how the system will work at a high level – this depicts Branches managing the entry system themselves, but the same principle applies if the integration partner actually manages the entries on behalf of the Branch.
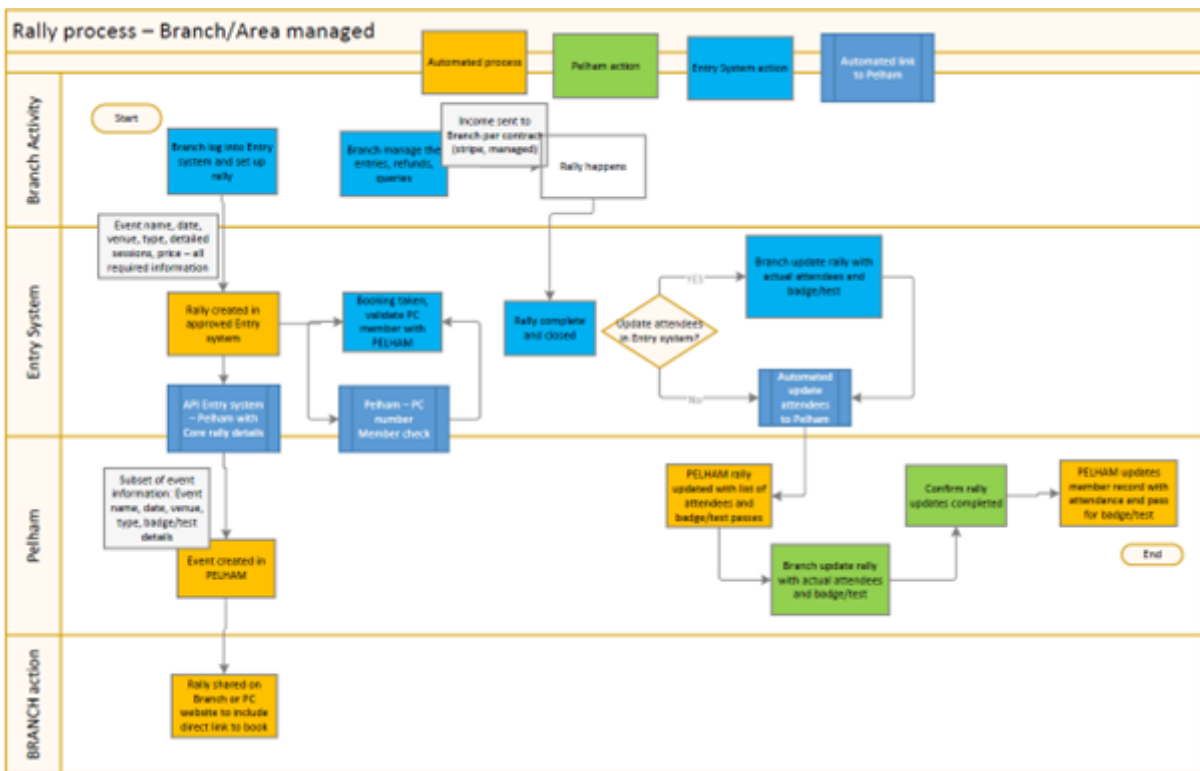
We have started sharing information with our Pilot group of Branches, and plan to make this integration with PELHAM available from mid-September. Unity will continue for a few months after this to assist Branches to transition to a new entry system, but it will be switched off at some point.

We would encourage you to start familiarising yourselves with these entry systems already without the integration which will give you experience of using their systems.

Additional Branch and Area email addresses

The Trustees have recently approved additional expenditure to support our Branch and Area committees by providing access to additional email addresses. Use of the new DC and Treasurer emails will be mandatory to meet GDPR requirements:

Branch DC/DC2	dc.branch@pcuk.org
Branch Treasurer	treasurer.branch@pcuk.org
Branch email (Secretary) - existing	branch@pcuk.org

These emails will not be Gmail accounts and so we will provide guidance on the transition to Outlook or Outlook web. PELHAM will be updated with these new email addresses and any personal / business ones removed for the Branch role (they will remain on your personal contact records).

In addition, larger Branches may choose from a max of 2 additional email addresses:

- rallies.branch@pcuk.org
- training.branch@pcuk.org
- tests.branch@pcuk.org
- hs.branch@pcuk.org
- teams.branch@pcuk.org
- safeguarding@pcuk.org

An option to request email addresses will be added to the support portal at the end of September.

Checking Memberships

NEW: the weekly branch email has been updated. Now it will show:

- **Any outstanding new member approvals**
- **Any unpaid memberships**
- **List of members due to expire in the next 2 weeks**
- **List of members expired in the past 7 days**

We hope that this assists with tracking your membership.

Reminder: any person in PELHAM connected with your Branch is ALWAYS visible to you. If they are not a current member / member administrator, the easiest way often is to use the Search function at the top of every screen. This will allow you to find anyone connected to your Branch in any role.
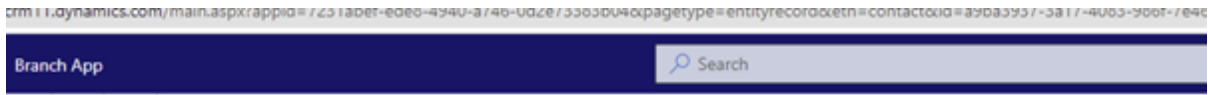
There are a couple of views which are useful at this time as we proceed through renewals:

- *Members expiring within 3 months*
- *Recently rejoined/renewed Members – within last 3 months*
    - This will also help to track progress as anyone who renews, even ahead of the expiry date, will be listed here.

Any memberships that have been started but not completed, i.e. unpaid, can be found using the view *"Memberships in progress (unpaid)" This includes those that have started the renewal process but are yet to pay.*

Please remember to use the project site with all of the user guides and updated videos:

PELHAM User Guides

Please report any issues or questions via the PELHAM support hub:

PELHAM Support Hub

NB when reporting issues, please do provide as much information as possible, including branch name, name/number of the contact/member with whom the issues is associated.