

Role description – Membership Secretary

1. Document purpose

To outline the role and responsibilities of a Membership Secretary.

2. Role summary

- To provide information to prospective members.
- To be responsible for the paperwork and administration pertaining to u3a membership.
- To maintain accurate membership records in the desired format.

3. Main responsibilities

Please note, the specific tasks listed below are in addition to the statutory requirements and responsibilities of trustees of charitable organisations in the UK as laid down by the relevant regulatory bodies. Some u3as may decide to delegate some of these tasks to other members of the committee e.g. the Treasurer.

3.1. Prospective members

- Publishing contacts locally and on the national u3a website and database for new member enquiries.
- Responding to enquiries from prospective members and providing them with full and detailed information on the ethos of the u3a organisation, costs, the membership application process, Gift Aid and the available space in the current interest groups.
- Developing joining packs for new members.
- Arranging open days for members of the local community to showcase what u3a is and offers, in order to increase awareness and attract new members.

3.2. New members

- Arranging regular new members meetings and consider setting up a buddy system so that they feel welcomed and included from the start.
- Reviewing with the committee the reasonable adjustments that might be needed to ensure accommodation of members with health or disability issues.
- Production and distribution of membership cards.
- Establish a system for gathering emergency contact details – if required.
- Maintaining close contact with the Group Coordinator in order to provide new members with accurate information about availability in interest groups.
- Liaise closely with the member responsible for the website to ensure that joining information is accurate and up to date.

- Review and update the local information provided to new members and ensure it is widely accessible.
- Review the membership application form periodically to ensure it is fit for purpose.

3.3. Membership fees and Gift Aid

- Liaising with the Treasurer on the financial aspects of membership e.g. accepted methods of payment, pro-rata subscriptions etc.
- Overseeing the renewal process.
- Sending out reminders and final reminders when renewal is due using all possible means e.g. newsletter, email.
- Maintaining a record of those members who wish to gift aid and passing the paperwork to the treasurer.
- Encouraging members to consider signing up to gift aid if they have not already done so.
- Recording of fees received and pass to the treasurer for banking as soon as possible.
- The reissue of membership cards or other proof of membership.
- Reminding group leaders to check that their group members have all rejoined.
- Follow up with members who do not rejoin and try to discover the reason.

3.4. Record keeping

- Maintaining up to date membership information in line with GDPR requirements.
- Retaining membership information, in line with HMRC requirements, for 7 years.
- Overseeing deletion of redundant membership information.
- Providing the committee with accurate figures for new members and the total number of current members.
- Creation and maintenance of an accurate database of members who wish to receive Third Age Matters.
- Uploading of accurate data via the online portal to the distribution company for Third Age Matters.

3.5. On completion

- To carry out a comprehensive handover to the new Membership Secretary.

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