

Membership Secretary Role Description

1. Role summary

- To provide information to prospective members.
- To be responsible for the paperwork and administration pertaining to Exeter U3A membership.
- To maintain accurate membership records in the desired format.

2. Main Responsibilities

Prospective members

- 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.
- Emailing new members with joining information.

New members

- Arranging regular new members meetings (New Members Cafe).
- Reviewing with the committee the reasonable adjustments that might be needed to ensure accommodation of members with health or disability issues.
- 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.

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.
- Ensuring all non-payers are deleted once the grace period is over and reminding group leaders to check that their group members have all re-joined.
- Follow up with members who do not re-join and try to discover the reason.

Record keeping

- Maintaining up to date membership information on the Beacon database in line with GDPR requirements and 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. Other

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

Reviewed July 2020