

Role of the Membership Secretary, Exmouth and District u3a

Role summary

1. To provide information to prospective members.
2. To organise and maintain the system for recording members' details including relevant financial records, and be responsible for all paperwork and administration relevant to U3A membership.
3. To organise and maintain the system for enrolling new members in-line with all financial procedures.
4. To maintain accurate membership records in the desired (On-line 'Beacon') format.

Main Responsibilities

Please note:

The specific tasks listed below are in addition to the statutory requirements and responsibilities of all trustees of charitable organisations in the UK as laid down by the charity regulators.

Some tasks are delegated and shared with other members of the committee e.g. the treasurer.

Responsible for:

General responsibilities

- Accurate recording and maintenance of contact and membership details of all members.
- Annual check of all members that data kept on-line is current and relevant and is maintained in line with General Data Protection Regulation (GDPR) requirements.
- Production and distribution of membership cards.
- Regular reporting to committee of relevant membership statistics and trends.

New members

- Reviewing the membership application form and other relevant documents periodically to ensure they are fit for purpose.
- Reviewing and updating the local information provided to new members and assist in ensuring it is widely accessible.
- Reviewing, with the committee, any reasonable adjustments that might be needed to ensure accommodation of members with health or disability issues.
- Liaising with the member responsible for our website to ensure that joining and membership information is accurate and up to date.

Prospective members

- Responding to enquiries from prospective members and providing them with detailed information on the ethos of the U3A organisation, costs, and the membership application process.
- Publishing contacts locally and on the U3A website for new member enquiries.

Membership Fees and Financial

- Liaising with the Treasurer on the financial aspects of membership e.g. accepted

- methods of payment, pro-rata subscriptions etc.
- Organising and carrying out the annual renewal process.
 - Sending out reminders and final reminders when renewal is due using all possible means e.g. newsletter, email, postal letters.
 - Recording of fees received and passed to the treasurer for banking as soon as possible.
 - The reissue of membership cards when required by members, as relevant.
 - Ensuring that the records of all non-payers are marked 'Lapsed' once the grace period is over and reminding group leaders to check that their group members have all re-joined.
 - Ensuring that the records of all members who notify the branch of their wish to terminate their membership are marked 'Resigned'.
 - Follow up with members who do not re-join and try to discover the reason.

Record keeping

- Maintaining up-to-date membership information in line with GDPR requirements and deletion of redundant membership information.
- Providing the committee with accurate reports on new members and totals of current members.
- 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.

Other

- To organise and lead the team of members who can assist the membership secretary as needed.
- To carry out a comprehensive handover to a new Membership Secretary when applicable.

In conjunction with other officers and committee members:

- To encourage and enable group organisers to use the Beacon system for their group activity record keeping.
- Arranging regular new members meetings so that they feel welcomed and included from the start.
- Maintain close contact with the Group Coordinator in order to provide new members with accurate information about availability in interest groups.
- Assist in 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.
- Establish a system for gathering emergency contact details – if required.
- Assist in developing joining packs for new members.

*Maurice Chittock,
Membership Secretary, 2018-2020
Feb. 2020*

*Revised by Olwen Smith, Membership Secretary (see purple text) November 2020
Agreed by Exmouth and District u3a committee 5th January 2021
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