

FIFE U3A -KEY DATES

ALL DATES ARE INDICATIVE ONLY AND SHOULD BE UPDATED AS NEEDED

	MAY	JUNE	JULY
	<ul style="list-style-type: none"> Monthly Meeting AGM 	<ul style="list-style-type: none"> Monthly Meeting – Members Day 	
	Committee Meeting <ul style="list-style-type: none"> Elect new office bearers Complete Fit & Proper Persons declaration for HMRC Conduct handovers with previous committee 	<ul style="list-style-type: none"> Committee Meeting 	
<i>TREASURER</i>	<ul style="list-style-type: none"> Propose payment to KUSI for approval by trustees Submit annual accounts and report to OSCR Update OSCR public register Update bank account signatories Update HMRC authorised contacts and office bearers 	<ul style="list-style-type: none"> Pay u3a Trust membership fees 	<ul style="list-style-type: none"> Agree any required changes to membership and Gift Aid forms with Membership Secretary
<i>SECRETARY</i>	<ul style="list-style-type: none"> Inform Third Age Trust of any changes to office bearers Inform u3a in Scotland of any changes to office bearers 		
<i>MEMBERSHIP SECRETARY</i>	<ul style="list-style-type: none"> Inform Third Age Trust of member addresses for mailing of Third Age Matters magazine in June 	<ul style="list-style-type: none"> Email newsletter to members 	<ul style="list-style-type: none"> Agree any required changes to membership and Gift Aid forms with Treasurer
<i>GROUPS COORDINATOR</i>			
<i>U3A MATTERS</i>		<ul style="list-style-type: none"> Attend u3a in Scotland AGM 	

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	AUGUST	SEPTEMBER	OCTOBER
	<ul style="list-style-type: none"> Annual Outing 	<ul style="list-style-type: none"> Monthly Meeting 	<ul style="list-style-type: none"> Monthly Meeting
	<ul style="list-style-type: none"> Committee Meeting 	<ul style="list-style-type: none"> Committee Meeting 	<ul style="list-style-type: none"> Committee Meeting
<i>TREASURER</i>	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Work with Groups Coordinator to arrange receipt of money from Group meetings 	
<i>SECRETARY</i>			
<i>MEMBERSHIP SECRETARY</i>	<ul style="list-style-type: none"> 11 August – Issue membership renewal letters Inform Third Age Trust of member addresses for mailing of Third Age Matters magazine in September Membership recruitment campaign (e.g. information stalls) 	<ul style="list-style-type: none"> 1 September – Start of membership year Issue Committee/Group Leaders contact details to members Email newsletter to members 	<ul style="list-style-type: none"> Inform Third Age Trust of member addresses for mailing of Third Age Matters magazine in November
<i>GROUPS COORDINATOR</i>	<ul style="list-style-type: none"> Hold Group Leaders annual meeting Introductory sessions with new Group Leaders 	<ul style="list-style-type: none"> Work with Treasurer to arrange receipt of money from Group meetings 	
<i>U3A MATTERS</i>		<ul style="list-style-type: none"> U3A Day Attend Third Age Trust AGM 	<ul style="list-style-type: none"> Submit U3A diaries order Policy Review – Social Media Policy

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	NOVEMBER	DECEMBER	JANUARY
	<ul style="list-style-type: none"> Monthly Meeting 	<ul style="list-style-type: none"> Monthly Meeting – Christmas Celebration 	<ul style="list-style-type: none"> Festive Lunch
	<ul style="list-style-type: none"> Committee Meeting 	<ul style="list-style-type: none"> Committee Meeting 	<ul style="list-style-type: none"> Committee Meeting
<i>TREASURER</i>	<ul style="list-style-type: none"> Propose payment to KUSI for approval by trustees Renew Zoom subscription (if needed) 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Pay u3a in Scotland membership fee Submit Gift Aid claim to HMRC
<i>SECRETARY</i>			
<i>MEMBERSHIP SECRETARY</i>	<ul style="list-style-type: none"> 30 November – Membership lapses for members not paying annual subscription 	<ul style="list-style-type: none"> Confirm membership list for TAM magazine Email newsletter to members 	
<i>GROUPS COORDINATOR</i>	<ul style="list-style-type: none"> Update Group membership details on Beacon 		
<i>U3A MATTERS</i>			<ul style="list-style-type: none"> Policy Reviews <ul style="list-style-type: none"> - Finance - Data Protection - Privacy - Fixed Asset Register

FIFE U3A -KEY DATES

	FEBRUARY	MARCH	APRIL
•	• Monthly Meeting	• Monthly Meeting	• Monthly Meeting
•	• Committee Meeting	• Committee Meeting	• Committee Meeting • Approve Trustees Report
• <i>TREASURER</i>	• Propose payment to KUSI for approval by trustees • Work with Secretary to produce draft annual report for OSCR • Confirm arrangements for independent examination of annual accounts with Fife Voluntary Action	• Finalise End of Year Accounts (to 31 March) • Recommend level of membership fees for year ahead	• Pay Third Age Trust magazine • Pay Beacon admin fee • Finalise report for OSCR • Produce finance documents for AGM • Pass required documents to Independent Examiner
• <i>SECRETARY</i>	• Begin preparations for May AGM • Work with Treasurer to produce draft annual report for OSCR	• Issue papers for May AGM	
<i>MEMBERSHIP SECRETARY</i>		• 1 March – start of half yearly membership period • Inform Third Age Trust of member addresses for mailing of Third Age Matters magazine in April • Email newsletter to members	
<i>GROUPS COORDINATOR</i>			
<i>U3A MATTERS</i>			

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	ONGOING
<i>CHAIR</i>	<ul style="list-style-type: none"> • Chair Monthly Meetings • Prepare introduction, review content and arrange printing and physical mailing of newsletter *
<i>TREASURER</i>	<ul style="list-style-type: none"> • Pay invoices
<i>SECRETARY</i>	<ul style="list-style-type: none"> • Prepare and distribute agenda for Committee meetings • Prepare and distribute minutes for Committee meetings • Action emails received via website Contact page and fifeu3a@gmail.com
<i>MEMBERSHIP SECRETARY</i>	<ul style="list-style-type: none"> • Maintain membership records
<i>GROUPS COORDINATOR</i>	<ul style="list-style-type: none"> •
<i>PROGRAMME COORDINATOR</i>	<ul style="list-style-type: none"> • Arrange programme of speakers for Monthly Meetings • Book St Bryce Kirk for Monthly Meetings • Prepare website and newsletter publicity for Monthly Meetings
<i>PUBLICITY OFFICER</i>	<ul style="list-style-type: none"> • Compile report on Monthly Meetings and circulate to local press