

Doc Membership Secretary Role Description	Date Feb 21
Ref U3A-KMS-DOC-068/Matlock Area u3a	Review Feb24

Membership Secretary Role Description

1. Document control

1.1. Approval

Date approved	March 21
Approved by	Gill N

1.2. Version history

Version	Date	Author	Change summary
1	Feb 21	Hilary E	Changed format
2	18 Mar 21	Gill N	Updated relevant info. to reflect now using Beacon for keeping records on membership, Gift Aid and Third Age Trust. Signposting members to information on Mau3a website. Added "consider" to some roles that are not currently being undertaken.

2. Introduction

2.1. Purpose

To outline the role and responsibilities of a Matlock Area Membership Secretary.

2.2. Scope

Relevant to Matlock Area U3A

2.3. Related documentation

U3A-KMS-DOC-052 Trustee induction
 U3A-KMS-DOC-064 Chair Role Description
 U3A-KMS-DOC-065 Secretary Role Description
 U3A-KMS-DOC-066 Treasurer Role Description
 U3A-KMS-DOC-067 Vice Chair Role Description
 U3A-KMS-DOC-069 Group Coordinator Role Description

3. Role summary

- To provide information to prospective members.
- To be responsible for the paperwork and administration pertaining to U3A membership and renewal.
- To maintain up to date membership records on the Beacon database.

4. 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.

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4.1. Responsible for:

4.1.1. Prospective members

- Responding to enquiries from prospective members and providing them information on the ethos of the U3A organisation, costs, the membership application process and Gift Aid.
- Signposting prospective members to the relevant sections of the Matlock area website for more information and about groups as applicable.
- To consider, in conjunction with the Publicity Officer, arranging open days for members of the local community to showcase what u3a is and can offer to attract new members.

4.1.2. New members

- Sending a welcome letter with relevant information to new members.
- Consider setting up a buddy system so that they feel welcomed and included from the start.
- Consider discussing, when appropriate, with the committee any reasonable adjustments that might be needed to ensure accommodation of a member with health or disability issues.
- Consider establishing a system for gathering emergency contact details – if required.
- Liaise with the Mau3a webteam to ensure that joining information is accurate and up to date.
- Liaise with the Mau3a webteam and Groups Liaison officer that information about the groups is up to date.
- Review the membership application form periodically to ensure it is fit for purpose.

4.1.3. Membership Fees and Gift Aid

- Liaising with the Treasurer on the financial aspects of membership and the processing of payments.
- Recording of fees received and passing to the treasurer for banking as soon as possible.
- Overseeing the renewal process.
- Sending out reminders when subscription renewal is due e.g. by newsletter, email.
- Communicating with the Groups Liaison Officer re overdue subscriptions to remind group coordinators to liaise with their members about overdue subscriptions.
- Maintaining a record on Beacon of those members who wish to Gift Aid so this is available to the treasurer.
- Encouraging members to consider signing up to Gift Aid if they have not already done so.
- Ensuring all non- payers are deleted (unless records are required to be kept for Gift Aid purposes) once the grace period is over.
- Consider following up members who do not rejoin to try to discover the reason.

4.1.4. Record keeping

- Maintaining up to date membership information 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.
- Storing information on Beacon re members who wish to receive Third Age matters. Uploading this data via the online portal to the distribution company for third Age Matters.
- Ensuring all non- payers are deleted from Beacon once the grace period is over.

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5. Other

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