

Membership Secretary Role

Main Purpose

To manage the membership process and keep appropriate membership records in

line with Third Age Trust (TAT) and GDPR guidance

To provide relevant information on membership to the committee

To be a participative member of the committee and liaise with and support other

committee members in their roles

Key responsibilities

Managing the membership application process

To provide information to people interested in joining Settle District u3a

To respond in a reasonable time to enquiries from people interested in joining Settle

District u3a and provide appropriate information about the U3A organisation, Settle

District u3a and how to join as a member

To process membership applications using the Beacon system and issue membership

cards

To liaise with the committee over any reasonable adjustments that might be needed

to ensure appropriate access for members

To review and keep the membership application form up to date

To review and ensure joining and renewing information on the website is up to date

New members

In liaison with the Chair and other committee members to organise regular new

members' meetings

To collate new member feedback and report to committee

To liaise with the committee over any reasonable adjustments that might be needed
to ensure appropriate access for prospective new members
To organise the questionnaire for new members and report feedback to the committee

Membership Fees and Gift Aid

To liaise with the Treasurer to ensure that banking records of fees paid are accurate
To bank cheques and cash received for membership
To give members information about the gift aid scheme and encourage all eligible members to sign up for gift aid

To ensure that the Treasurer has all appropriate membership information so that they can make an accurate gift aid claim to HMRC
To keep member gift aid declarations

Managing the annual renewal process

To manage and coordinate the annual renewal process
To send out appropriate renewal reminders by email (and letter if no email) when renewal is due
To organise printing of membership cards for all those opting not to download from Beacon
To renew members on the Beacon system
To lapse any members who have not renewed after the 3 month grace period
Liaising with group leaders to ensure that all their group members have re-joined
Where appropriate, to investigate why members have not renewed, with a particular focus on members who have not renewed after their first year and report to

committee

Record Keeping

To keep appropriate and accurate records in line with GDPR requirements

To report membership information to the committee as requested

To delete/safely destroy information no longer needed in accordance with GDPR

Other

To upload member data as requested by TAT (The Third Age Trust) via the online

portal to the distribution company for TAM – the Thursday Age Trust magazine

To provide a list of names and addresses of all members not using email for

distribution of the monthly newsletter

To carry out a comprehensive handover to the new Membership Secretary when the term in office finishes.

Updated November 2023