

## Role Description for Membership Secretary

### Committee Member and Trustee

Key area	Key responsibilities	Tasks
<b>Governance</b>	Trustee	<ul style="list-style-type: none"> <li>Maintain the charitable objectives of the u3a.</li> <li>To comply with the requirements of the Charity Commission</li> <li>To be accountable for expenses incurred</li> </ul>
	AGM	<ul style="list-style-type: none"> <li>Attend and support Chair during meeting</li> </ul>
	Documentation	<ul style="list-style-type: none"> <li>Ensure all relevant documentation is stored either digitally or paper-based filing</li> </ul>
	Enrolment	<ul style="list-style-type: none"> <li>Attend and support Meet and Greet Day and distribution of associated material, as agreed</li> </ul>
<b>Committee Duties</b>	Committee Meetings	<ul style="list-style-type: none"> <li>Attend and contribute to Committee meeting agenda items.</li> <li>To tender an apology of absence to the Business Secretary, if necessary</li> <li>Carry out any actions following the meeting.</li> <li>To observe confidentiality of committee meetings</li> </ul>
	Group Facilitator (GL) and New Member meetings	<ul style="list-style-type: none"> <li>Attend meetings and contribute to agenda items</li> </ul>
	Sub- committees	<ul style="list-style-type: none"> <li>Contribute to sub-committees as relevant</li> </ul>
<b>Member Support</b>	Member updates / communication	<ul style="list-style-type: none"> <li>Attend monthly member meetings when possible.</li> <li>Assist with administration of the meeting, as required.</li> <li>Support other Committee members, as required</li> </ul>
<b>National U3A Interface</b>	National office communications	<ul style="list-style-type: none"> <li>Read national u3a monthly newsletter</li> </ul>

### Role specific responsibilities for the Membership Secretary

Key area	Key responsibilities	Tasks
<b>Governance</b>	Enrolment New members	<ul style="list-style-type: none"> <li>Attend and provide an enrolment / renewal facility at the Meet and Greet Day</li> <li>Review New Member Application form to ensure this meets information needed, including the General Data Protection Regulation</li> <li>Record new member applications and fee payments</li> </ul>
	Enrolment - renewals	<ul style="list-style-type: none"> <li>Organise the annual renewal process with the Beacon Managers</li> <li>Review the process annually.</li> <li>Liaise BACs payments with the Treasurer.</li> <li>Receive cheque payments and pass to Treasurer.</li> <li>Check and monitor on - line renewals.</li> <li>Follow up and analyse non-renewals.</li> <li>Organise renewal letters in consultation with Chair and Beacon Manager and send out renewal reminders mid -October.</li> </ul>

		<ul style="list-style-type: none"> <li>Record renewals and new member details on Beacon</li> <li>Continued monitoring of current members, new members, and outstanding renewals</li> </ul>
<b>System</b>		<ul style="list-style-type: none"> <li>Assist with administration of the Beacon, by ensuring that only necessary data is stored. Delete resigned, deceased, lapsed and suspended in line with process.</li> </ul>
<b>Committee duties</b>	Committee Meetings	<ul style="list-style-type: none"> <li>Provide committee with any relevant information relating to enrolments / membership</li> </ul>
<b>Member support</b>	Member updates / communication	<ul style="list-style-type: none"> <li>Manage membership secretary table at monthly meetings.</li> <li>Ensure that payment machine is available to other committee members for events that have joining opportunities.</li> <li>Point of contact for Group Leaders when checking valid membership details</li> </ul>
<b>Public interface</b>	Communication	<ul style="list-style-type: none"> <li>Act as point of contact for new member enquiries/ applications via email, phone, letter etc.</li> <li>Answer reduced fee enquiries from members of other U3As</li> </ul>
<b>Skills required</b>		<ul style="list-style-type: none"> <li>Organisational skills</li> <li>Ability to use word and excel</li> <li>Team player</li> </ul>
<b>Agreed</b>	14/09/2021	
<b>Updated</b>	10/10/23	