



Role Description

Membership Secretary

- First point of contact on all membership matters/enquiries.
- Act as Membership database controller.
- Attend all committee, general meetings and annual general meetings (or arrange a stand-in). Supply blank Membership forms and welcome visitors and potential members.
- Supply the AGM registration team with an up-to-date membership tick list.
- Before each committee meeting, provide a Membership Report with statistics on membership and any other relevant information since the last committee meeting. This should be emailed to all committee members in advance of the committee meeting as requested by The Secretary
- Provide all new members with a welcome email or phone call.
- Update the Membership form each year to show the next current year so it's ready for the start of April.
- Complete the processing of membership forms on Beacon (as per the Beacon guidelines) as soon as possible after receipt.
- Keep and maintain all members' details using the Beacon system.
- Pass payments details for new members and renewals to the Assistant Treasurer with a list of the members name and the sum included (cheques or cash) on a Payment Record Sheet. Keep a copy of this form.
- Collect payments from visitors at general monthly meetings and enter on a Payment Record Sheet.
- Attend the annual network meeting of local Membership Secretaries each February.

- Keep Membership Forms/Gift Aid donation forms on file.
- 5 times a year send database to National Office before each u3a Matters magazine delivery in their required format (downloaded from Beacon). Details of cut-off and publication dates are provided by National Office.

Renewal of Membership Subscriptions

- Starting in May every year remind and follow up the renewal of subscriptions from members, initially by inserting a reminder in the monthly bulletin. During the two months to the end of the subscription period on 30th June monitor the renewals by keeping the database up to date with money received and remind individuals who have not paid that their subscriptions are due.

At the earliest point after the end of the membership year (30th June) an email should be sent to all Group Co-Ordinators informing them that members who have not renewed for the coming year are highlighted on their group page on Beacon. They have one months' grace until the end of July to pay or they will be considered lapsed (Membership Secretary to action on Beacon).

Reviewed & Updated by Kevin Stock June 2024