



Cheddar Valley u3a
Role description – Membership Secretary

1. Role summary

- To provide information to prospective members.
- To be responsible for the paperwork and administration pertaining to u3a membership.
- To maintain accurate membership records in the desired format.

2. Skills and Experience

- Very keen interest in working with people
- Strong organisational skills
- Basic computer skills

3. Main responsibilities

The specific tasks listed below are in addition to the statutory requirements and responsibilities of trustees of charitable organisations in the UK as laid down by the relevant regulatory bodies. Some of these responsibilities may be delegated to other members of the Committee.

3.1. Prospective members

- Publishing contacts locally and on the national u3a website and database for new member enquiries.
- Responding to enquiries from prospective members and providing them with full and detailed information on the ethos of the u3a organisation, costs, the membership application process, Gift Aid and the available space in the current interest groups.
- Developing joining packs for new members.
- Arranging open days for members of the local community to showcase what u3a is and offers, in order to increase awareness and attract new members.

3.2. New members

- Reviewing with the committee the reasonable adjustments that might be needed to ensure accommodation of members with health or disability issues.
- Production and distribution of membership cards.
- Establish a system for gathering emergency contact details – if required.
- Maintaining close contact with the Group Coordinator in order to provide new members with accurate information about availability in interest groups.
- Liaising closely with the member responsible for the website to ensure that joining information is accurate and up to date.
- Review and update the local information provided to new members and ensure it is widely accessible.
- Review the membership application form periodically to ensure it is fit for purpose.

3.3. Membership fees and Gift Aid

- Liaising with the Treasurer on the financial aspects of membership e.g. accepted methods of payment, pro-rata subscriptions etc.
- Overseeing the renewal process.
- Sending out reminders and final reminders when renewal is due using all possible means e.g. newsletter, email.
- Maintaining a record of those members who wish to gift aid and passing the paperwork to the treasurer.
- Encouraging members to consider signing up to gift aid if they have not already done so.
- Recording of fees received and pass to the treasurer for banking as soon as possible.
- The reissue of membership cards or other proof of membership.
- Ensuring all non payers are deleted once the grace period is over and reminding group leaders to check that their group members have all rejoined.
- Follow up with members who do not rejoin and try to discover the reason.

3.4. 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.
- Creation and maintenance of an accurate database of members who wish to receive u3a Matters.
- Uploading of accurate data via the online portal to the distribution company for u3a Matters.

3.5. On completion

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

Approved by the Trustees of Cheddar Valley u3a in March 2025.