



Role description – Membership Secretary

Category: Recruitment

1. Document purpose

To outline the role and responsibilities of a Membership Secretary.

2. 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.

3. Main responsibilities

Please note, 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.

3.1. Prospective members

- Liaising with The Communications Sub-Committee to ensure that HHD publish 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, and Gift Aid.
- Assist in the development and update of joining packs or information for new members.
- Assisting with the arrangements for open days for members of the local community to showcase what u3a is and what HHD u3a offers, in order to increase awareness and attract new members.

3.2. New members

- Arranging periodical new members meetings and gather feedback for the relevant HHD Executive Committee (EC) members.
- Production of membership cards.
- Collate and report to the EC on information gathered from the responses to the question “How did you hear of us?” on the application form, on a regular basis.



- 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.
- Liaise closely with the HHD Webmaster and the Communications Sub-Committee 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.
- Issue the membership cards and welcome pack in a timely manner.
- Review the membership application form periodically.

3.3. Membership Renewal

- Liaising with the Treasurer on the financial aspects of membership e.g. accepted methods of payment, pro-rata subscriptions etc.
- Liaising with the Treasurer on the renewal process and investigating any issues as appropriate.
- Reminders and final reminders when renewal is due, are issued by the Treasurer using Beacon.
- Encouraging members to consider signing up to gift aid if they have not already done so.
- The reissue of membership cards or other proof of membership.
- Assist the Treasurer as required in following up with members who do not rejoin and try to discover the reason.
- Sole initial responsibility for the appropriate response to death and bereavement among HHD u3a membership.

3.4. Record keeping

- HHD u3a maintains its membership database on the Beacon system, maintained by the Treasurer.
- Supply any relevant up to date membership information to the Treasurer, in line with GDPR requirements.

3.5. On completion

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

u3a	HHD u3a Role Description-Membership Secretary	
Version	Description of changes	Date
Draft v1	Revised with local information from u3a generic version	05/02/2023
Draft v2	Further revision of 3.3	07/02/2023
V1	Approved by Executive Committee	15/02/2023