

Kings Norton u3a March 2026

Membership Secretary

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 regarding King Norton u3a membership.
- To maintain accurate membership records in the desired formats.
- Will be Committee member and Trustee of Kings Norton u3a.

3. Main responsibilities

3.1 Publicity

- Ensure latest Membership Secretary contacts details are uploaded to national office, are on KN website, publicity leaflets and membership forms.
- Respond 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 arrangements for joining Interest Groups..
- General Meetings: ensure Membership Applications forms and current publicity leaflets are available at registration.

3.2 Members Records

- Reviewing with the committee the reasonable adjustments that might be needed to ensure accommodation of members with health or disability issues.
- Ensure correct membership numbers are handed to Business Secretary for update of records for Capitation and separately for Beacon charges.
- If decided by the committee: produce and distribute of membership cards.
- Remind members to keep Emergency contact up to date.
- 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 Website administrator to ensure that joining information is accurate and up to date. .
- Review the membership application form regularly to ensure it is up to date.

3.3 Membership fees and Gift Aid

- Liaise with the Treasurer on all financial aspects of membership.
- Carry out the renewal process.
- Bank cheques, cash.
- Send reminders and final reminders when renewal is due, using all possible means eg. letters, email, request Chair to remind members in monthly letter.
- Encouraging members to consider signing up to gift aid if they have not already done so.
- Keep in regular contact with the Treasurer regarding payments of fees into the bank account.
- Reissue of membership cards or other proof of membership if local policy.
- Ensure all non payers are deleted once the grace period is over and reminding group leaders to check that their group members have all rejoined.
- Liaise with Beacon Administrator about IG records and Membership renewal period.

3.4 Record keeping

- Maintain up to date membership information in line with Data Protection requirements and overseeing deletion of redundant membership information.
- Provide the Committee with accurate figures for new members and the total number of current members.
- Maintain up to date information on Beacon of members who wish to receive u3a Matters.
- Uploading of accurate data via the online portal to the distribution company for u3a Matters.
- Retain paper copies of all membership applications. Review retention periods according to HMRC Gift Aid requirements.

3.5 General Meetings

- Liaise closely with Beacon Administrator to complete register of members attending GM.
- Record details of any Visitors and regularly review names.
- Encourage Visitors to join, provide application forms etc.
- Produce register from Beacon in the Administrators absence.
- Answer enquires from Members and Visitors about membership issues.
- Make back copies of u3a matters available to any one interested.

3.6 South Birmingham Network

- Regularly liaise with Network Co-ordinator to ensure consistency of arrangements between the three u3as.
- Retain paper copies of Network applications.
- Two months after start of membership year inform Network Membership Secretaries of Kings Norton Network members.
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4. On completion

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