

ROLE OF MEMBERSHIP SECRETARY BFu3a

The Membership Secretary should be elected at the Annual General Meeting (AGM) in accordance with the BFu3a Constitution.

Primary Tasks

- Manage all aspects of BFu3a membership using Beacon (See the u3a Beacon User Guide) and in accordance with requirements of GDPR.
- To forward enquiries from prospective members to New Members Secretary who will provide them with literature on BFu3a and the Membership Application process
- Review the Membership/Renewal forms regularly
- Process manual Membership applications on Beacon, tick any relevant Polls and carry out subscription splits where applicable e.g., newsletter/donations
- Check new online applications are fully completed, tick any relevant Polls and carry out subscription splits where applicable e.g., newsletter/donations
- Bank Cash and Cheque Subscriptions and complete Credit batch in Beacon.
- Liaise with the treasurer regarding any payment queries
- Confirm the Committee's policy on membership year, renewal dates, subscriptions, and policy regarding new members joining part way through the year.
- Oversee the renewal process
- Write an article reminding members of the renewal date and the subscription charges for the appropriately dated Newsletter
- Carry out manual renewals making any necessary changes to the information held
- Assist members with any difficulties they have renewing online, tick any relevant Polls and carry out subscription splits where applicable e.g., newsletter/donations
- Change the status of members who do not renew to lapsed, and removed them from the database, unless there is a legitimate reason for keeping them e.g., Gift Aid
- Follow up with members who do not re-join to try to discover the reason
- Liaise with the Group Support Officer to advise Group Co-ordinators of any members who haven't yet renewed or have resigned or lapsed
- Assist the Treasurer as necessary with maintaining an accurate Gift Aid record
- Submit a list of members addresses who have agreed to receive a copy of the u3a TAM (Third Age Trust Magazine) using the online secure portal
- Provide News editors with the number of printed copies needed and ensure the printed copies are posted out
- Prepare a tick sheet including all current members for Open Meeting attendance record and advise Chair & Administration secretary of numbers attending. This may be done by an appointed member.
- Carry out any necessary changes to members details on Beacon
- In the event of a members death change their status on Beacon and remove their details unless there is a legitimate reason for keeping them e.g., Gift Aid
- Keep the "Membership Handbook" comprehensive and up to date and ensure that an up-to-date copy is held on the Committee section of the BFu3a website

Aspects Applicable to all Committee Positions

Ensure opinions expressed in Committee meetings are regarded as confidential.



Bracknell Forest u3a

Charity Number 1153789

No matter what individual trustees' opinions or voting choices are, once an item is approved by the Committee, all trustees must accept it as decisive and final without further comment (see National Office Trustees Code of Conduct – Corporate Responsibility)

Where possible and by agreement, undertake ad hoc tasks as required by the Committee

Forward a brief report to all Committee members 7 days prior to the next Committee meeting

Prepare and carry out a comprehensive handover to a new incumbent when appointed