

# Duties of Membership Secretary

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## Registration of New Members

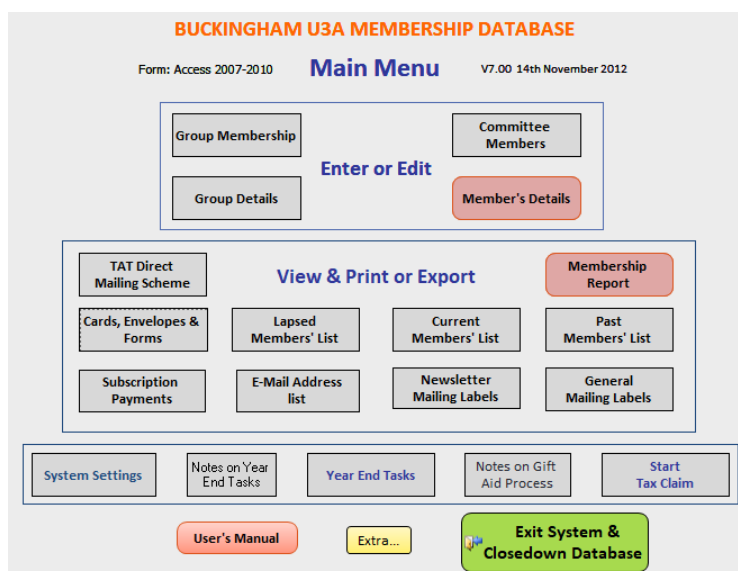
1. Applications are received by post, email and in person at open meetings. Once a sub is paid, each applicant is registered into a database as a current member. Otherwise they may be designated as pending members.
2. Membership cards are either emailed or sent in post. Use database to generate cards.
3. A welcome letter and latest copy of the newsletter are also emailed or posted.
4. Send list of new members to New Members' Secretary at regular intervals, who will invite them for Coffee Mornings. They are held 3 or 4 times a year.
5. It is usual practice to consider subs paid by new members who joined from July to September to be treated as pre-payments for next year. The reason being no activity during August.

## Renewals of Membership

1. Send out renewal notice by email early September. Prepare a general notice of renewal for September Newsletter and send it to the editor before copy date (usually before the end of August).
2. Expect most renewals at the September and October open meetings. Ask everyone to write their membership number or postcode at the back of cheques. No cash to be accepted.
3. Details of SO and bank transfer payments will be provided by the treasurer. They have to be recorded in the database.
4. Pass all cheques collected to the treasurer.
5. Enter all subs into the database and ensure that membership status is "Current".

## Database

1. Specially developed database software is employed to manage membership records.
2. It is very user-friendly. The Main Menu, as shown below is displayed when starting the database.



3. Most of the membership activities are run by this software at the click of a button from the main menu.

## End of the Year Task

Around 30 Sep, carry out end of year of task. This is an automated task performed by the database.

## Membership Cards

1. Use CARDS, ENVELOPES & FORMS button to send out membership cards by email or by post.
2. Order number of envelopes needed. C6 size is adequate for cards and accompanying documents.

3. Generate labels for households without email to send cards. Pass envelopes for franking and posting to Roland Simpkins.
4. Report lapsed members to the committee and Group Co-ordinators at the end of October, November and December months. 3 months late renewal grace expires on 31 Dec.

## Refunds

Every year there are about 10 to 15 cases where double payments have been made by mistake. They have to be refunded. Record payments, raise cheques and post them with refund letters generated by the database

## GAD data

Run START TAX RECLAIM to list subscriptions eligible for Gift Aid tax reclaims soon after 6<sup>th</sup> April and send the list to the treasurer.

## Committee Meetings

1. As a trustee, membership secretary is a member of the committee, which meets on Mondays preceding each monthly open meeting.
2. Membership report generated by the database is usually presented at the meeting.

## Direct Mailing of Third Age Trust (TAT) magazine and Resources

Central U3A sends out 5 issues of TAT and Resources to all members directly. There are 5 windows in the year when a list of current members and their addresses has to be supplied. Use TAT DIRECT MAIL SCHEME option to create the list and upload it to [u3a.dmp-online.co.uk](http://u3a.dmp-online.co.uk).

## Buckingham U3A Newsletters

1. 3 issues (Dec, Apr & Sep) of the newsletter are published per year. Address labels of those receiving printed newsletters are printed and given to the Newsletter editor.
2. When a newsletter is published and available as pdf file, email it to remaining members. Retain extra hard copies for distribution to new members when they join.

## Main Monthly activities:

Aug	Send general renewal notice to Newsletter editor.
Sep/Oct	Send personalised renewal notice by email (optional). Start receiving renewal subs and record them in the database. Perform End of Year task on 30 Sep. Post or email membership cards. Final reminder to lapsed members for sub renewal.
Nov/Dec/Jan	Arrange refunds. Tidy up database (past & deceased members) after most of the renewals are recorded. Send lapsed lists to group co-ordinators.
Apr	Prepare GAD data.
All months	Record all subs in the database as they arrive. Expect about 5 per month outside peak Sep/Oct and Jan periods.

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