Role description – Membership Secretary

The role:

As Membership Secretary you will:

- Provide information to prospective members.
- Be responsible for administration relating to u3a membership e.g. membership joining processes.
- Maintain accurate membership records, in the format agreed with the Support Team.
- Be the go-to person at our u3a for new and potential members.
- Act in line with the u3a Trustee Code of Conduct.

Skills & attributes:

- An enthusiasm for growing membership at u3a and passionate about u3a.
- Good organisation skills; methodical approach with strong attention to detail and accuracy.
- A team player who enjoys working with others.
- Good communication skills. Able to clearly explain the benefits of joining u3a and the membership processes and procedures.

Support for your role:

- Help from experienced and current Support Team members.
- Trustee induction with our u3a.
- Handover and support from the outgoing Membership Secretary, where possible.
- Information, advice and workshops are available from the Third Age Trust, via the u3a website or by email, info@u3a.org.uk.
- Networking opportunities with local u3a networks, region/nation support teams and Council Representatives.

Key tasks:

Please note that some duties can be delegated to other members of the Committee and or volunteer, by agreement of the Trustees.

Prospective and new members

- Ensure contact details for our u3a are available to prospective and current members and kept up to date with the Third Age Trust.
- Respond to enquiries from prospective members. Provide information needed to become a member (e.g. membership application process).
- Produce and distribute membership cards.
- Maintain close contact with the Groups Coordinator to provide new members with accurate information about availability in interest groups.

Communications and support

- Arrange open days for members of the local community to showcase u3a and the benefits of joining. Increase awareness and attract new members.
- Develop joining/welcome packs for new members.
- Arrange regular new members meetings. (Your u3a may also consider setting up a buddy system so that new members feel welcomed and included from the start.).
- Review with the Support Team any reasonable adjustments that might be needed for members with health or disability issues.

Ongoing administration

- Liaise with the Treasurer on the financial aspects of membership e.g. accepted methods of payment, pro-rata subscriptions, gift aid and processes to ensure the treasurer knows who has paid for their membership and when etc.
- Oversee the membership renewal process; send out reminders and final reminders when renewal is due.
- Re-issue membership cards or other proof of membership.
- Maintain up-to-date membership information in line with data protection requirements. Oversee deletion of redundant membership information (e.g. those who do not renew their membership).
- Provide the Support Team with accurate figures for new members and the total number of current members.
- Create and maintain an accurate list of members who wish to receive the Third Age Matters magazine. Upload this data, via the online portal, to the distribution company.

Helpful information

- Charity Commission 5-minute guides for charity trustees.
- u3a Trustee Code of Conduct.
- To find out more, please email chair@burscoughu3a.org to learn more about the role.

u3a	**Role description: Membership Secretary**	**The Third Age Trust**
Version	**Description of changes**	**Date**
1.0	Creation of new template document	31/01/2026