Role description – Membership Secretary

This role description template is designed to be adapted and used at your u3a.

The role *(add a couple of sentences which outline the core responsibilities and duties)*

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 committee
- 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: *(add characteristics & attributes needed for the role)*

- 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: *(outline the support your u3a can offer)*

- Help from experienced and current Committee 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: *(list tasks in a clear and methodical order)*

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.

TEMPLATE

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 committee 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
- Maintain a record of members who wish to add Gift Aid; ensure this information is shared with the treasurer
- 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 committee 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 [add email address] to learn more about the role

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

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