

## **Peterborough & District Family History Society**

### **Job Description for the Membership Secretary**

NOTE 1: This can possibly be combined with the Treasurer's Role (see "Combination Reasons").

NOTE 2: Committee members are elected at each AGM but specific roles are allocated at the next committee meeting.

The Membership Secretary is a member of the Committee.

The role of the Membership Secretary is to administer and maintain the Subscriptions, Renewals and Membership Records of the Society.

The responsibilities of the Membership Secretary include either undertaking the following tasks, or delegating them to another member and ensuring that they have been carried out:

- Receive applications and renewals for membership and enter the details on the electronic database:
  - The database will be secured in accordance with the Society's GDPR processes;
  - Referring to the committee applications/renewals that the Membership Secretary feels should be declined.
- Advise new members (usually by email) of the following:
  - Their application has been successful;
  - The current username and password to access the Members' Area of the website;
  - Their Welcome Pack will be found in the Members' Area;
    - A pack should be posted if the new member does not have internet access.
- Retain copies of Application and Renewal forms:
  - These can be scanned and the originals securely destroyed.
- Receive Gift Aid forms and record details on the Membership Database.
- Maintain the membership records on the Membership Database, including:
  - Noting Change of Address and/or email;
  - Removing details of non-renewing members and keeping them on a separate database in accordance with the Society's GDPR processes including HMRC audits, especially Gift Aid;
  - Back up the Membership Database in accordance with the Society's GDPR processes.
- Advise the Society Secretary of:
  - New member's email and area in which they live;
  - Changes to existing/renewing member's emails and area in which they live;
    - The Society Secretary uses the location details to send information of family history activities in the relevant areas.
  - Details of non-renewing members;
  - The death of any member.
- Advise the Editor (or whoever produces the labels for posting the Journal) of:
  - New member's addresses;
  - Changes to existing/renewing member's addresses;
  - Non-renewing members' addresses;
  - The death of a member.
- Forward Standing Order instructions and cheques to the Treasurer for processing;
- Prepare a subscription renewal reminder for the March Journal;
- Assist with the preparation and submission of a claim for Gift Aid to HMRC annually;
- Deal with correspondence from members and forward any relevant queries to other committee members;
- Submit a written report of current membership numbers and attendance at monthly meetings to every committee meeting.

#### **Skills relevant to the role:**

- To be able to use databases (spreadsheets) and emails;
- To be able to work on their own and as part of a team;
- To have oral and written communication skills;
- To possess tact, discretion and respect for confidentiality;
- To be flexible.

#### **Combination Reasons**

This role may be combined with that of Treasure because:

- Only one address for members' financial and membership correspondence;
- The Treasurer both banks subscriptions and receives the Bank Statement with details of membership payments;
- The Treasure needs to keep membership details secure as per GDPR so merging the roles means only one membership database needed and thus reduce the risk of any inadvertent breaches.