

FOTW MEMBERSHIP SECRETARY GUIDE

General

The primary role of the Membership Secretary is to manage a list of some 600-650 members of the charity. This includes:

- Signing up new members
- Renewing memberships from 1 April
- Issuing membership cards
- Chasing late payments and lapsing non-renewers
- Managing an Access database of members, in accordance with data protection principles
- Maintaining and updating the list of members' emails.

The Membership Secretary also:

- Works closely with the Treasurer, collecting all **payments** in the first instance and keeping records of those members who have signed up for Gift Aid. He shares his renewal spreadsheet with the Treasurer and provides **financial reports** at the end of the financial year to assist with the charity's annual Gift Aid claim to HMRC.
- Assists with the **mailing** process by providing address labels derived from the membership data. He also provides information on current member totals to inform print requirements during a mailing event.
- Provides membership **lists** on an ad hoc basis to those Trustees who are running events. He also provides a list of new members to the Newsletter Editor for each Newsletter edition (3 times a year); and a list of new members for the New Members events which are held approximately twice a year.
- Has responsibility for maintaining stocks of Friends' membership **leaflets**, providing a supply to Reception staff at The Wilson and ordering a reprint when stocks get low. He similarly keeps a sufficient supply of blank **membership cards**.
- Joins fellow Trustees at bi-monthly committee **meetings**, providing a written report on the status of membership activity to the Secretary a week before the meeting.

To support these various tasks, the Membership Secretary needs to keep a stock of stationery, printer ink and stamps, and provide invoices to the Treasurer for any expenses incurred. There is a dedicated laser printer which can print labels.

New Members

New members sign up using either the form in the Friends' leaflet or by downloading an application form from the Friends website. Sometimes they sign up at Reception at The Wilson when buying a ticket for an event, in order to offset the cost of the ticket against the Friends' membership fee.

Membership mail and completed application forms are held by the Admin Staff at The Wilson and collected by the Membership Secretary as and when. On request the staff will also bundle up the membership mail and post it to the home address of the Membership Secretary.

On receipt of an application form the Membership Secretary:

- Enters the details in the membership database
- Checks that payment details are correct and that cheques are signed and dated
- Makes a copy of and files any Gift Aid declaration
- Sends out a welcome pack by post to the new member
- Where possible, sends a welcome email with the latest Newsletter attached
- Records any email address in the local file and on the Friends' Mailchimp list
- Keeps cheques, standing orders, etc for future handover to the Treasurer, and updates the local tracking record.

Notes:

- a) Details on using the membership database are covered in a separate document.
- b) For members joining on or after 1 October the membership lasts until 31 March of the year after next. To avoid overpayments the Treasurer should not implement any standing orders until 1 April of the year after the application.
- c) The welcome pack includes a letter from the Chairman, the list of Items Purchased by the Friends, the Visits & Tours list and a membership card/s.

Renewals

A. Timings

The annual round is the most time-consuming part of the Membership Secretary's role. It can last from February to July although the majority of the work happens in April and May.

Most of the standing orders pay out on or around 1 April, though some are implemented in March and others in May/June (for which there is a separate list).

However, the first task is to take advantage of the January Newsletter mailing. It is advisable to both write an article in the N/L itself, reminding members that renewals are due, and include a prominent flyer in the mailing which targets cheque-payers. The database can generate discrete label runs for cheque and standing order-payers. The flyer should remind members of the categories and rates, the preference for standing order payments, and the Membership Secretary's address for posting payments. To minimise costs, cheque-payers are also requested to include a stamped addressed envelope for their membership cards.

This process can be repeated in the May N/L mailing to address any late payers. Again, it should be possible (with the use of the marker field - see below) to provide a discrete label run for this.

The last task in June is to phone round or email the remaining members who have not renewed.

B. Process

Standing Orders/Bank Transfer

At the beginning of April the Membership Secretary confirms members' payments by standing order through online access to the Friends' bank account, before sending out membership cards for the year. (Note: new cards are only sent out to Individual or Joint members. Members in other categories such as Life or Patron already have one-time cards). Cards may be printed on a compatible printer, printed commercially or hand-written.

The database record for each member is updated by: (i) changing the 'Date renewed' field to the date the payment was received in the Friends' account, and (ii) inserting an 'R' in the marker field. The latter facilitates later monitoring of members who have renewed and those who are pending.

The 'Data selection form' enables selective printing of labels for standing order-payers.

Notes:

- a) There are a few standing orders that pay out in March and others through May/June.
- b) Not every standing order is easy to identify, but there is a separate file which lists the anomalies.
- c) Likewise there are still some payments from old standing orders from members long since lapsed which cannot be identified. These are treated as donations. Again, there is a separate file which lists these payments.

Cheques

The process for handling cheque payments is almost the same. The cheques should be scrutinised for correct payee information and payment amount, as well as signature and date. The cheques are handed over to the Treasurer for banking at a convenient time.

Payments can arrive any time between March and May, and there are some members who need reminding again in June and July. The 'Date renewed' field should be updated on receipt of the cheque.

If the member has enclosed a covering letter or application form, it is worth checking that all the information in the database record is correct. In addition the member may have enclosed a new Gift Aid mandate which should be filed.

Again, the 'Data selection form' enables selective printing of labels for cheque-payers.

Notes:

- a) Sometimes a member will send a cheque, not realising that they already pay by standing order. Usually the member will agree that the extra amount can be retained as a donation. This is recorded in the 'Donations' field at the bottom of the member's record.

Lapsed memberships

If a member cancelled their membership or otherwise fails to renew after reminders, their record can be lapsed. The category is changed to 'Lapsed' and the 'Date left' field is filled in: this will usually be 31 March, unless the member cancels mid-year, in which case the current date should be shown.

The record should be retained in the current database until any financial reports have been run. After that it can be archived using the 'Archive Lapsed Members' utility on the database's main menu.

The member's email address should be deleted from the local file and the Friends' Mailchimp list.

Donations

Donations can be sent as a separate cheque, added to the membership renewal payment, or come from any overpayment for membership renewals. It should be added to the 'Donations' box at the bottom of each member record, with a clarifying comment as appropriate.

Markers

By inserting an 'R' into the marker field it is easy to run queries to show which members have yet to renew their membership. Once the renewal round is complete - normally at the start of July - the marker fields can be reset by using the 'Clear all markers' utility on the main menu.

C. Reports

Reporting falls into two categories: lists of members by name and total; and financial reports.

Membership lists

To help manage the Events process, organisers request ad hoc lists of current members which are sent by email to a single recipient. Lists of new members for inclusion in the Newsletter are sent to the Editor three times a year. The Membership Secretary also prepares lists of new members for the bi-annual New Members Events. A summary of membership stats is also provided to the bi-monthly Trustee meetings.

Apart from these reports, personal details from the membership database are not widely disseminated, in line with good Data Protection practice.

Financial Reports

The Membership Secretary provides three financial reports at the end of the financial year: Subscriptions, Donations, HMRC Gift Aid claim. The process for running these reports is covered in a separate document.

The reports are normally run before the end of March, before the bulk of any changes are made to the database from the renewal round. The Treasurer may also ask for reports in July/August, once all the renewal payments have been received, in order to make an early Gift Aid claim to HMRC.

Mike Jenkinson
August 2017

Appendix - List of Files

Guide to using the membership database, including financial reports

New members' payment spreadsheet

Renewals spreadsheet

List of standing orders which pay out other than 1 April

Crib for odd standing orders

List of standing order payments that cannot be identified