

Membership Secretary instructions

The intention of the membership secretary role is to assist in managing the membership of Gladstone U3A. Historically we have a lot of members who for one reason or another decide not to renew their membership. Often they return at a later date, when there is a specific course they wish to attend. People are required to be members before they attend a course.

In Member Wizard, we keep details of people and the courses they enrol for. When Member Wizard first opens up, it will be on the Members list and will be displaying "Active Members". Please note that our subscription to Member Wizard is based on the number of Active Members we have. The list of Active Members shows people whose membership has recently expired as well as fully paid up members.

If you click on the box next to Status, it allows you see people who are Inactive. These are people who have previously been members but have lapsed, and also people who have expressed an interest in the organisation, but not actually joined. If there is no "Membership Paid To" date, you can assume that the person falls into the latter group.

The order in which to attack this project is as follows:

- 1) People who have recently expired memberships
- 2) People who are going to expire in the next month or so
- 3) People from the Inactive group who may or may not be interested in coming back
- 4) People from the Inactive group who have never joined.

On the side menu, underneath "Members" you will see there is a button labelled "Expiring/Owing Memberships" This will allow you to quickly identify people in groups 1 and 2 above,

If you look at the Communications menu in Member Wizard, you will see that I have created (under Templates) a sample email for you to send out to Group 1 people. I suggest that you tailor this to your requirements. If you wish to add your personal contact details, please feel free to do so, although in the fulness of time, we plan to get you on board with an email address of membership@gladstoneu3a.com, but for now, we will monitor any responses to that address.

I suggest that you add more templates for the different groups of people. The wording will be slightly different, but you should be able to use the "Recently Expired" one as a starting point.

Back to Members – Expiring/Owing Memberships and you can sort the list on the Membership To column by clicking on the header of that column. This will put Group 1 people at the top and Group 2 people at the bottom.

You can put a tick next to the people you wish to email and then click Next. You can then "Add Template" to the body of the email. Type a Subject such as "Membership Reminder Gladstone U3A" and then Click Send. This will send individual emails to all of the people you selected.

I suggest that you keep a note of the people you email and then follow up in a couple of weeks, if they have not renewed.(If they disappear from the "Expiring/Owing Memberships" list, you can assume they have renewed or contacted us to say that they no longer wish to be emailed.

Note that Member Wizard currently does not allow emailing to Inactive members, so it will be more complicated to contact the people in groups 3 and 4.

Some members may not have an email address recorded. Some members may be sharing an email address with others. In this case, it may will currently be difficult for them to access the Members

Portal. Soon we hope to be able to allow access using their Mobile number, but for now, that is not available and if you get a person with this issue, please refer them to us (Steve – tech@gladstoneu3a.com or Kathy admin@gladstoneu3a.com)

Member Wizard also allows us to contact people via SMS but we use this only for bulk SMS messages not individual ones as there is a cost per message involved. I'm thinking that if people do not respond to your email messages, it might be worthwhile sending them an SMS from your own phone. If this becomes problematical, U3A may consider the purchase of another mobile phone for this purpose.