

Hollywood District u3a

Committee Member and Officer Role
Descriptions

Introduction

These role descriptions are intended to help new volunteers understand what the role demands, and to give some clarity to the role-holder.

The 'Committee Member' role description refers to all members of the Committee, whether also office holder or not.

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Committee Member Role Description

Overview

u3a Committee members guide and support their local group, ensuring activities run smoothly and the organisation's values are upheld. The role, in common with all the others, is voluntary and focused on promoting lifelong learning and community engagement. This description applies to all Committee members including Office Bearers.

Main Responsibilities

- Governance: Oversee group operations, ensure compliance, and uphold the u3a principles and mission statement.
- Planning: Help set goals and shape the future direction.
- Meetings: Attend and contribute to regular Committee meetings and decisions.
- Help identify speakers for General Meetings.
- Finance: Approve budgets and monitor spending, supporting the Treasurer.
- Communication: Share information with members.
- Support: Foster an inclusive, welcoming atmosphere for all members.
- Risk Management: Identify risks and ensure all policies are followed.

Key Skills

- Teamwork, communication, organisation, reliability, discretion, problem-solving, and commitment.

Chairperson Role Description

Overview

The chairperson leads the local u3a, supporting its effective and inclusive operation while promoting lifelong learning and community engagement.

Key Responsibilities

- Provide clear direction and leadership to the Committee and members.
- Chair and organise Committee meetings, set agendas, and encourage participation.
- Represent the local u3a at external events and build relationships with other groups including non-u3a organisations.
- Promote a friendly atmosphere, welcome new members, and encourage feedback.
- Ensure compliance with u3a guidance, Holywood District u3a constitution, charity law, and good governance.
- Mediate disputes and resolve issues fairly, seeking advice from u3a Trust when needed.
- Support strategic planning for growth and new initiatives.
- Lead the Annual General Meeting and ensure Charity Commission and constitutional requirements are met.
- Lead the monthly general meeting, or organise a deputy.
- Co-ordinate the arrangements for external speakers.
- Check the “Chairperson” email account at least weekly and respond as needed.

Personal Qualities and Skills

- Strong leadership, communication, and organisational skills.
- Integrity, diplomacy, and problem-solving ability.
- Vision for future growth and adaptability.

Treasurer Role Description

Role Overview

The Treasurer plays a central role on the u3a Committee, managing the financial affairs of the organisation. This includes maintaining accurate records, monitoring income and expenditure, and ensuring transparency in all financial matters. A methodical approach and good numerical skills are important, but formal accountancy qualifications are not required.

Main Responsibilities

- Maintain up-to-date records of all income and spending (subscriptions, events, grants, etc.) and keep supporting documents.
- Work with the Committee to prepare budgets and monitor finances to keep the u3a sustainable.
- Oversee banking, process authorised payments (including to u3a Trust), and reconcile accounts.
- Report the financial position regularly to the Committee, maintain the Beacon finance records, and prepare annual accounts for the AGM.
- Prepare Accounts as approved at AGM for the auditor and provide to the auditor.
- Ensure compliance with financial regulations, u3a guidance, and charity law where relevant.
- Support collection of membership fees and answer payment queries.
- Process membership subscriptions paid by bank transfer and advise the Membership Secretary.
- Check the “Treasurer” email account at least weekly and respond as needed.

Key Relationships

- Committee members (for decision-making and communication).
- Membership Secretary (Close liaison is required with regard to all membership subscriptions and related queries.)
- Group convenors (for advice).
- Banks (for day-to-day management).

Essential Skills

- Numeracy and accuracy.
- Organisation and reliability.
- Integrity and confidentiality.
- Clear communication.
- Basic IT literacy (spreadsheets, online banking, email).

Secretary Role Description

Role Overview

The Secretary for a u3a group is a vital volunteer who manages records, correspondence, and communication for the Committee and membership. This role ensures the smooth running of meetings and the effective flow of information.

Main Duties

- Arrange Committee meetings and the AGM, prepare agendas, and distribute documents.
- Take and circulate accurate minutes; maintain records and archives.
- Handle correspondence, answer queries, and refer matters as needed.
- Ensure meetings comply with the u3a constitution and policies and report any Committee changes to the u3a Trust.
- Support the Chair and Committee with administrative tasks and help prepare reports and plans.
- Safeguard member information and adhere to data protection laws (GDPR).
- Liaise with external organisations and the Third Age Trust.
- Prepare and submit the Charity Commission annual report in conjunction with the Chairperson, the Membership Secretary, the Treasurer, and the IT Administrator.
- Check the “Secretary” email account at least weekly and respond as needed.

Skills and Qualities

- Good organisation and attention to detail.
- Strong written and verbal communication skills.
- Discretion and reliability.
- Comfort working in a team and using basic IT tools.

Membership Secretary Role Description

Introduction

The Membership Secretary for the u3a plays a vital role in managing member records, assisting new and existing members, and supporting the Committee to ensure a welcoming and organised experience for all.

Main Duties

- Maintain accurate and up-to-date membership records using the Beacon system in line with data protection rules.
- Handle new member applications, annual renewals, and respond to membership enquiries.
- Arrange for the production of membership cards.
- Prepare membership reports for the Committee; help with event and AGM attendance lists.
- Provide welcome materials and guidance for new members.
- Collect information from member questionnaires and report to the Committee.
- Collaborate with the Treasurer for record-keeping and payment reconciliation.
- Attend Committee meetings and support recruitment events when needed.
- Check the “Membership” email account at least weekly and respond as needed.

Skills Needed

- Strong organisation and attention to detail.
- Friendly communication and discretion with personal information.
- Basic IT skills.

Groups Coordinator Role Description

Role Overview

The Groups Coordinator at u3a supports and develops a diverse range of interest groups for members, serving as the main contact for group leaders and acting as a bridge between these leaders, the Committee, and the wider membership.

Key Responsibilities

- Support group leaders, offer guidance, and help resolve challenges, including finding rooms.
- Encourage and set up new groups to meet members' interests.
- Check potential group leaders are appropriate and capable.
- Help group leaders to complete risk assessments where needed.
- Maintain up-to-date records of groups, leaders, and meeting times.
- Promote good communication and collaboration among groups.
- Pass on important news, policy updates, and feedback to and from the Committee, and to the Newsletter editor and Webmaster.
- Check 'Groups' email account weekly and respond appropriately.

Skills and Qualities Needed

- Organisational and communication skills.
- Approachable, supportive, and able to work well with others.
- Basic IT skills.
- Commitment to u3a's values of learning and inclusion.

Beacon and IT Administrator Role Description

Purpose of the Role

This position maintains the u3a Beacon Membership Management System and provides general IT support, ensuring technology benefits all members and supports the group's needs.

Main Responsibilities

- Manage accounts, permissions, and support for Beacon and Microsoft 365 users.
- Manage the Microsoft non-profit user account.
- Keep data accurate, secure, and up to date.
- Work with the national Beacon support team on updates and troubleshooting.
- Advise on IT issues and online resources in collaboration with the Webmaster.
- Manage the relationship with external contractors, especially the Webhosting and design company, (currently Ardnet) commissioning work as required.
- Support users with group's digital tools and promote cybersecurity best practices.
- Ensure compliance with data protection regulations (e.g., GDPR).
- Provide simple training and support for Committee members using Beacon and other digital tools.
- Assist with IT-related projects and share best practices with other u3a groups.
- Check the "ITadmin" email account at least weekly and respond as needed.

Key Skills and Attributes

- Competence with online systems and basic website management
- Ability to explain IT issues clearly to non-technical users
- Attention to detail and good organisational skills
- Patience, reliability, and willingness to help others
- Respect for confidentiality and data protection
- Willingness to learn and adapt

AV Organiser Role Description

Purpose:

To organise the audio-visual equipment required for u3a meetings and coordinate the volunteers who assist.

Main responsibilities:

- Ensure that the projection equipment (screen/projector) is appropriate
- Ensure that the audio equipment is appropriate (microphones, amplifiers, speakers)
- Recommend to the Committee any necessary purchases
- Set up the equipment for u3a meetings (monthly general meetings and gardening group)
- Organise volunteers to ensure someone is available for all meetings
- Contact speakers for general meetings to confirm their A/V requirements
- If necessary organise a briefing session with speakers to check arrangements
- Help guest speakers to fit and use microphone and connect laptop / projector
- Store and maintain A/V equipment
- Liaise and negotiate with other venue users over physical arrangements in Queen's Hall, Old School House, the Library and any other venue where necessary for AV set-up.

Newsletter Editor Role Description

Role Summary

The u3a Newsletter Editor plays a vital part in keeping members informed and connected, curating content that highlights organisational news, upcoming events, member achievements, and opportunities for involvement. The editor manages the entire process from collecting material to final distribution.

Main Responsibilities

- **Content Sourcing:** Ask group leaders to provide updates for the coming month – usually two weeks before the end of the month; ask the Group chairperson for any input such as upcoming speakers or announcements they may have; and ask the IT administrator for anything they would like to have included.
- **Editing and Quality Control:** Edit submissions for readability, accuracy, and relevance. Proofread all content to ensure high standards and a friendly, inclusive tone.
- **Organise sign-off** by Chairperson before publishing.
- **Layout and Design:** Organise articles and images into an attractive, easy-to-read format using publishing software e.g. word processing software. Ensure visual consistency with u3a branding and accessibility for all readers.
- **Publication and Distribution:** Coordinate the timely release of each newsletter (in PDF format usually a week before the end of the month; post 6 print copies in Holywood library; and forward a PDF copy to the Group Webmaster to upload to the Group website.
- **Compliance:** Ensure content respects privacy, copyright, and u3a policies. Note: editor needs to be made aware of copyright and u3a policies.
- **Archiving:** Maintain an organised record of past newsletters for reference and historical interest.
- Check the “Newsletter” email account at least weekly and respond as needed.

Key Skills

- Excellent written communication and editorial judgement
- Strong organisational and time-management skills
- Attention to detail and accuracy in editing and layout
- Competence in basic IT, word processing; familiarity with Beacon and in particular how to send emails to the members; how to incorporate photos and other graphics into documents and save the word processing document in PDF format.
- Ability to work collaboratively and handle sensitive information discreetly

Webmaster Role Description

Essential Responsibilities and Skills

The u3a Webmaster is essential for maintaining the organisation's online presence and supporting communication among members. Their main duties include managing the website, updating content, and ensuring that information is clear, accessible, and secure.

Key Responsibilities

- **Website Maintenance:** Keep the site up-to-date, secure, and functioning smoothly, publishing news, events, and group activities.
- **Content Management:** Work with group leaders and Committee members to gather and upload newsletters, minutes, photographs and other documents.
- **Upload the new month's Newsletter** within 2 days of each general meeting, or before the start of the new month.
- **User Support:** Help members with website access and resolve technical issues.
- **Accessibility:** Make sure the site meets web standards and is usable for everyone.
- **Design & Usability:** Maintain a user-friendly navigation and clear layout.
- **Technical Liaison:** Coordinate with service providers or developers as needed.
- **Training:** Occasionally train others and maintain basic documentation.
- **Check the "Webmaster" email account** at least weekly and respond as needed.
- **Collaborate with organisers and leaders** to share information.

Skills and Attributes

- Knowledge of web platforms (e.g. WordPress), and good organisational skills.
- Attention to detail, clear communication, and a willingness to solve problems quickly.
- Integrity and respect for confidential data.
- Openness to learning new tools and technology.

Best Practices

- Design for smartphone and computer accessibility.
- Use clear navigation and consistent branding.
- Comply with GDPR and privacy standards.