

Membership Policy of Lancaster and Morecambe u3a

Membership Principles

- Membership of Lancaster and Morecambe u3a (L&M u3a) is open to all in their third age, which is defined not by a particular age but by a period in life in which full-time employment has ceased.
- Members promote the values of lifelong learning and the positive attributes of belonging to a u3a.
- Members are expected to follow the principles of the u3a Movement and the L&M u3a Code of Conduct which clarifies the standard of behaviour expected of a member of a u3a.

Membership Records

- The Beacon membership management system provided by Third Age Trust Trading Ltd drives the process and is used to store the primary record of member's details.
- To meet HMRC regulations for Gift Aid, membership records are kept for a period of 7 years.
- Members of L&M u3a have access to view and amend their contact details held in membership records. This is achieved through the Beacon Member's Portal.

Membership Secretary

- Has full Read/Write access to membership records within the Beacon membership database.
- Has prime responsibility for maintaining membership records:
 - New member registration.
 - Renewal of membership.
 - On request issue of Membership Cards.
 - Gift Aid declarations.
 - Changes to member status e.g Current, Lapsed, Resigned etc.
 - Can amend member contact details.
 - Can filter a list of members based on attributes.
 - Can filter a list of new members within a date range.
 - Can export member addresses for direct mail or postal label production.
 - Can view membership statistics.
 - Can communicate with members through the Beacon email system.

Membership Subscriptions

- Membership subscription rates are set and agreed by the Trustees of L&M u3a and notified to members at a General Meeting.
- Subscriptions are non-refundable.
- Membership is from 1st September to 31st August and is renewable in advance.
- New members joining between 1st April and 30th June are charged a reduced subscription for the current year.
- Membership of New Members enrolled in July or August includes the following year.
- Subscription renewal is open from 4th August to 15th September
- Renewal of Lapsed members will be at the full annual subscription rate.
- Communication with members will be made by email. If this is not possible then a full member of L&M u3a may receive printed copies for an additional contribution.
- The membership subscription gives basic rights of membership and does no more than cover the basic administrative costs of the charity. It can be classed as a donation and Gift Aid can be claimed on the membership fee.
- Basic administrative costs include: u3a National Office capitation, Beacon registration, TAM, Newsletters, AGM and Committee expenditure.

- Interest groups overall should be substantially self-financing. They do not qualify for Gift Aid and support from membership subscription is limited by legislation.

Membership Cards

- Issued by email on receipt of online payment of membership subscription.
- Members may download a copy of their membership card using the Member's Portal.
- Membership card displays member's name and membership number.
- Members who are unable to download a membership card can receive a card copy by sending a stamped self-addressed envelope to the Membership Secretary.
- Lost or damaged membership cards may be replaced on receipt of a stamped self-addressed envelope to the Membership Secretary.
- Members to provide their Membership card or membership number as proof of membership if requested at General Meetings and Interest Groups.

Membership Classes

- **Individual Member** – Full member of L&M u3a
 - Full voting rights at General Meetings
 - Subscription includes capitation fee for the Third Age Trust and Beacon registration.
 - Communication with the member by L&M u3a is by email
 - Receives Third Age Matters magazine (One per household) unless member opts not to receive.
- **Postal Member** – Full member of L&M u3a
 - Full voting rights at General Meetings
 - Subscription includes capitation fee for the Third Age Trust and Beacon registration.
 - Communication with the member by L&M u3a is by post.
 - Receives Third Age Matters magazine (One per household) unless member opts not to receive.
- **Honorary Member** – Nominated by the Trustees for services to L&M u3a
 - No voting rights at General Meetings
 - No capitation fee paid to the Third Age Trust.
 - Beacon registration paid from L&M u3a funds.
- **Associate Member** – Full member of another u3a
 - No voting rights at L&M u3a
 - Can not be a Trustee of L&M u3a
 - No capitation fee paid to the Third Age Trust
 - Communication with member by email only
 - Subscription includes Beacon registration.
 - It is the responsibility of the member to maintain Full Membership of a nominated u3a.
 - Associate membership of L&M u3a ceases immediately if membership of the nominated u3a lapses.