

CHANGES TO MEMBERSHIP ADMINISTRATION, STRUCTURE AND SUBSCRIPTIONS

In November 2020, the Friends' unincorporated charity was dissolved, and assets were transferred to the new charitable incorporated organisation (CIO). As part of the plans for the CIO we are now implementing changes to our membership administration and a long overdue revision and restructure of subscriptions and methods of payment.

We are now updating our membership management processes with a new software package which we have bought from a respected provider. This will enable us to increase efficiency, reduce the workload of the volunteer membership secretary and meet our regulatory obligations more effectively.

We have set out some answers below to clarify and explain what is happening and how the changes will affect the members. If after reading these you are still not sure about any aspect of the changes and how they will affect you please contact the membership secretary: membership@ftna.org.uk or write to us c/o CEE, The National Archives, Kew, Richmond, Surrey, TW9 4DU. (Note that there may be a delay in responding to mail.)

FREQUENTLY ASKED QUESTIONS

1. TRANSFER OF MEMBERSHIP TO THE CIO

[If you have already transferred please go to section 2]

1.1 Why must I sign a transfer of membership to the CIO?

The law requires that to become a member of a charitable incorporated organisation (CIO) a declaration must be made to support the charity. The law does not stipulate how a member should support the charity and leaves it to the member to decide how best they can offer their support.

Members joining the Friends' unincorporated association charity did not have to make a similar undertaking. Therefore, we need members to sign an agreement to transfer their membership and support the CIO. New members will have a similar declaration as part of the membership application.

1.2 What happens if I do not sign a transfer form or decline?

Whilst your membership of the Friends remains current there will be no change and you can continue to access all the membership benefits. For administrative purposes to help us manage the transition between the two charities all members have been transferred to the CIO.

Those members who have signed an agreement to transfer have become full voting members of the CIO. Those who have not yet signed have become temporary associate members of the CIO but only until their membership renewal is due. Temporary associate members do not have any voting rights.

1.3 What happens when my membership is due for renewal?

When your membership renewal becomes due and you have agreed to transfer then your membership category and rate will be amended accordingly, with no interruption to your membership benefits.

When your membership renewal becomes due but you have not signed a transfer form agreeing to join the CIO, then your membership will cease. At that point you have a last chance to transfer and continue your membership with the CIO.

2. CHANGES TO MEMBERSHIP CATEGORIES AND RATES

2.1 Why are the categories changing?

The current arrangements were introduced in 2014, and have remained unchanged due to various logistical reasons. A review of the structure and rates was undertaken by the CIO trustees and it was agreed that a completely new and simplified structure and rates should be introduced after incorporation.

2.2 Why are the rates changing?

The rates need updating in line with today's cost of living. The changes will enable us to extend and develop our funding support to The National Archives for a wider range of document, research, outreach and education projects.

The increased rates are comparable with those of other organisations supporting national institutions, and in some cases they are much less.

The change also presents an ideal opportunity to realistically link the subscription rates to the financial needs of the charity and set a fixed proportion for charitable support to The National Archives, who will be the primary beneficiary.

We want to use this process to help manage our operating costs and, over time, to reduce the proportion of members' subscriptions used to meet them. Once the new rates have been introduced there will be a bi-annual review to monitor and manage the need for further changes. Ultimately, it will be much fairer to members who will be able to see how their subscriptions are used.

2.3 What are the changes to the membership subscriptions?

The new membership categories and rates are:

M1 – Individual £30

M2 – Joint Membership (two people at the same address) £45

M3 – Discount (age over 18 and under 27 years, studying in higher education) £20

M4 – Institutions and organisations £90

M5 – Life Membership £500

There are no discounts for auto renewal or for a digital copy of the magazine. Concessions will only apply to members under 27 years of age studying in higher education.

2.4 What will my new category and rate will be?

Once we have a confirmed start date, every member will be contacted by our new software partner VeryConnect with the new rate and means of payment.

Old Category	New Category
A1, A2, A3 - Individual	M1
B1, B2, B3 – Individual plus One	M2
C1, C2, C3 – Concession (under 26 and over 60 years)	M1 (if 27 and over) M3 (If under 27)* <small>* studying in higher education</small>
D1, D2, D3 – Concession plus One	M2
E1, E2 – Charity or Corporate	M4
F – Overseas Supplement	-
G – Life Member under 60	M5
H – Life Member over 60	M5

3. CHANGES TO MEMBERSHIP MANAGEMENT

3.1 Why is management of the membership changing?

One of the reasons for incorporating the charity was to enable the trustees to outsource some of the administrative tasks to professional providers and relieve the burden on the volunteers who kindly undertake the bulk of the work to ensure the Friends runs smoothly and is compliant with the numerous regulatory obligations.

3.2 What are the changes to membership management?

We are transferring our membership administration to the professional provider VeryConnect and their extensive software package. This will enable a more automated and less time-consuming means of membership management. There will still be a membership secretary who will oversee membership matters and be the point of contact for queries.

3.3 Who are VeryConnect?

We have chosen VeryConnect to provide us with a comprehensive membership management software package. The trustees are satisfied that they have chosen a reliable partner who will deliver a secure and professional service that meets our current needs with scope to develop in the future. The company provides software and support to a number of public, private and charity organisations across 16 countries including the UK Department for Education Office for Students, Fiji National University, University of Strathclyde, Society of Antiquaries of London and the Society of Genealogists.

3.4 Will my data be safe under these new arrangements?

Yes, VeryConnect is an established and professional provider of data services. They are compliant with the legal obligations for data protection.

4. METHODS OF PAYMENT

4.1 What are the new payment methods?

- When we transfer our membership management to VeryConnect's platform we will also be changing the means of payment for subscriptions. We need to simplify the means of payment for both new membership and renewals.
- We will no longer be accepting standing orders and will be adopting direct debit, GoCardless and Stripe as the standard method of payments. These methods will be more convenient and efficient for everyone and will not require further updating, as is the case with standing orders.
- Renewals and new membership applications will be moved online and the options to pay in the bookshop, by cheque or cash will be withdrawn. We need to streamline the system for methods of

payment to reduce the voluntary time and effort involved in managing our membership administration.

4.2 When will the changes be introduced?

The changes will be implemented during December 2021 in time for the January 2022 renewals. There will then be a rolling programme as renewals become due month by month, with the new structure and rates fully implemented by December 2022.

5. IMPLEMENTATION – YOUR PART IN THE TRANSITION

5.1 What do I need to do?

- Complete the membership transfer form if you have not already done so. **Please treat this as a priority.**
- Follow the guidance in the email that you will receive from VeryConnect to set up your single sign on account. The new one-stop access will enable you to set your preferences and make amendments to your membership details as well as accessing the magazine, articles, podcasts and blog in our members' area. The current arrangements for logging in to our website will be discontinued.
- Follow the guidance in the renewal notice emails you receive and arrange payment by the new method(s) specified.
- Once the new payment arrangements are in place **please cancel any standing order mandates you may have.**

6. MEMBERSHIP BENEFITS

6.1 Will membership benefits change?

There will be no immediate change to the current range of benefits available. However, as the subscriptions will be increasing, we are already actively seeking ways to increase the extent of benefits with additional talks and events, online and hopefully in person at Kew when restrictions permit, and increasing website content.