### JOB DESCRIPTION

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| Job Title: | Membership Co-ordinator |
| Job Grade: | 6 |
| Date of Completion: | July 2018 |
| Job Title of Line Manager: | Membership Manager |
| Division: | General Counsel |

PURPOSE OF JOB

The Membership Team acts as the main conduit for income to the profession and as part of that team the post holder holds a key role ensuring that income to the profession in respect of subscriptions and Practising Certificates is properly allocated.

The Team are also responsible for the monitoring of compliance with the CPD Scheme and administration of the Practising Certificate Regime

Overview of General Counsel Directorate Function

The General Counsel directorate is responsible for delivering the IFoA's regulatory strategy, in the public interest. This includes considering and granting applications for practising certificates and monitoring compliance with our CPD regime.

This role includes responsibility for:

* Subscriptions payments
* Practising Certificates
* CPD Monitoring and compliance
* Members personal details on the database
* Mutual Recognition Applications
* List of Actuarial Advisers maintenance and fees
* Ad hoc General Counsel projects
* Vetting of criteria for various application types

PRINCIPAL ACCOUNTABILITIES

* To assist in the co-ordination and implementation of the subscription campaign each year which involves planning and organising the changes to rates, rules and categories. Also assisting in co-ordinating the mailing to members. Dealing with all applications for reduced subscriptions ensuring criteria met. Using discretion in granting such.
* To collect all membership subscriptions including any additional subscriptions due by all members ensuring correct amounts are paid, reconciled and allocated to each individual account. To apply surcharges appropriately and initially deal with members who oppose such.
* To reconcile BACs payments, credit card payments and direct debits. Solving problems and investigating missing and incorrect payments. Working with members, employers and bankers to resolve.
* To assist in delivering high level support for members who require a Practising Certificate.
* Collecting and allocating Practising Certificate income of over £1m.
* Checking all Practising Certificate applications received to ensure that they are completed with sufficient information for a decision to be made on suitability of the applicant. Checking CPD undertaken is compliant and relevant.
* To deal with requests from members for reinstatement to the profession. Ensuring that the policy is adhered to, giving guidance to the member as required.
* To provide ad hoc support as necessary to projects undertaken from time to time by the directorate.
* To be responsible for applying processes in connection with CPD monitoring. This requires attention to detail in checking the evidence produced by members.
* To deal with members enquiries by telephone and email.
* To understand and be able to apply the mutual recognition agreements when applications are received. Applying judgement and initiative to ensure all applications are scrutinised and that any adaptation period or exam has been assessed or passed. Each agreement is different so attention to detail is paramount.
* To process applications In connection with the List of Actuarial Advisors which is a web based interface. Making additions and corrections as necessary, sending out and dealing with payment of invoices.
* Updating the membership pages on the website.

MAIN CONTACTS

Internal

* Membership Manager, Subscriptions and administration, as line manager
* Membership Manager, Practising Certificates
* Head of Membership
* General Counsel
* Finance
* Education Services

External

* Members and their employers
* Other Actuarial Bodies
* Actuarial Companies in relation to the List of Actuarial Advisers

DECISIONS

* Determine whether to grant reduced subscription rate against criteria
* Determine whether to grant Partial Regulation against criteria
* Vetting and making decision on reinstatement applications to full membership and confirming such.
* Scrutinise CPD evidence provided to ensure that it meets the requirement set out in the CPD Scheme.
* Signing off CPD audits without recourse to manager
* Acceptance of completed PC applications
* Acceptance of information to allow a CRB check to be carried out.
* Prioritising a constantly changing workload allocating time appropriately. Raising priority issues upwards as appropriate.
* Scrutinise Mutual Recognition applications and supporting documentation to ensure all criteria met.

**COMPLEXITY**

* On a daily basis the team interact with members by e-mail and by phone. Each enquiry varies from call to call, the team therefore need to use good investigation and influencing skills to resolve issues but above all need tact, diplomacy and very strong customer care skills.
* Membership team often receive payments which are not easily allocated, so liaison with employers and other internal departments is essential to rectify and reconcile payments. This is especially so in dealing with the complexities of BACs.
* Balancing demands of a varying workload
* Supporting Membership Manager to ensure deadlines are met
* Take responsibility for providing information and advice to members over a variety of areas, in an appropriate manner within agreed deadlines.

IMPACT

* The team is one of the main interfaces with the membership and must operate as smoothly as possible to ensure members maintain their faith in the profession as an organisation.
* Income from subscription payments is the main stay of the profession’s income and would have a serious impact on the financial position of the profession if not handled timeously.
* Practising Certificates are a very high profile area where the impact could be serious if a certificate was issued in error so attention to detail is absolutely paramount.
* CPD, as part of the regulatory function of the profession is a mandatory requirement of all practising actuaries and monitoring is essential.

KNOWLEDGE AND EXPERIENCE

Essential

* Must be able to work as part of a team
* Very strong customer service skills both written and verbal
* Ability to communicate with people at all levels
* Excellent attention to detail and accuracy
* Flexible and adaptable in their outlook
* Able to work on own initiative with minimal supervision
* Must be able to organise own workload and take responsibility/ownership
* Good IT skills
* Some compliance knowledge
* Ability to multi task

Desirable

* Experience of working with a membership database

**Values and Behaviours**

* Professional
* Accountable
* Collaborative
* Supportive

The role holder will require to demonstrate each of the values of Community, Integrity and Progress in accordance with the IFoA‘s Values and Behaviours framework.