

# Role Profile

**Role title: Membership Services Officer**

**Reports to: Membership Supervisor**

**Date: 29<sup>th</sup> September 2021**

**Job purpose:**

To assist with all aspects of the work connected to the membership application and the subsequent renewal process, ensuring compliance with all internal standards, for the benefit of the membership of the Association.

**Financial:** Responsible for the processing of all payments made by members to BACP, including direct debit payments & failed payment processing. Ability to raise invoice & refund requests, to then be authorised.

**Staff:** No reports

**Other:** Individual practitioners & organisational members, 58,000 annual membership renewals, 7,000 applications, regular direct contact with members and the wider public

**Principal accountabilities:**

Provide in-depth information to members, liaising with other departments as necessary, to ensure the satisfactory resolution of membership related queries.

To evaluate evidence against set eligibility criteria, communicating with members to obtain further information when required, whilst ensuring all required standards of the Association are met.

To process the main functions of membership in relation to applications, renewal and re-instatement, in line with all internal standards and published Terms & Conditions.

Confidently communicate results of applications, renewals and reinstatements, whilst maintaining a positive relationship with the applicant, when communicating negative information.

Ensuring the accurate processing of all membership payments received by BACP, whilst being able to prioritise workloads to strict internal deadlines, by maintaining member's subscriptions accurately on BACP's database.

Liaise with members regarding failed payments and effectively communicate the consequences of non-payment to their membership as appropriate.

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Update and maintain filing systems and databases to ensure accurate information is correctly updated, in line with all internal requirements and external legislation.

Co-ordinate the collation of member data, to be forwarded to appropriate third parties, allowing the timely issuing of renewal documents and journal publications to members.

## **Context:**

Operating environment:

Requires an in-depth knowledge of BACP's membership application and renewal process. Also requires an understanding of BACP's Accreditation schemes and Register requirements. Can have input into areas of development and provide suggestions for changes to processes.

Organisation:

Membership Supervisor



**Membership Services Officer**

## **Relationships:**

Direct reports: None

Manager: Weekly roundtable updates, monthly 1-2-1's and bi-monthly team meetings

Other contacts: Works closely with Customer Services and Accreditation teams within BACP. Potential to interact with any of BACP's 58,000 members and the wider public. Regular contact with BACP's preferred mailing house and publisher.

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## **Knowledge & experience:**

### Experience:

Minimum of 2 years working in a Customer Service role

Previous experience of being able to assess information against set criteria

Previous experience of being able to process financial payments, including the processing of direct debit reject reports

### Competencies:

Excellent communication skills with a proven track record of success

High level of computer literacy, including the previous use of a CRM database

Excellent organisation skills

Excellent attention to detail

Problem solving skills

## **Job challenge:**

BACP's success in the market place has meant that the volume of new applications to membership and their subsequent renewal, have increased rapidly. It is important that a Membership Services Officer can maintain excellent attention to detail, whilst being able to organise their own workload, ensuring internal standards are maintained.