



## Job Description

- Job Title:** Membership & Finance Officer.
- Reports to:** Director.
- Job Purpose:** To support the day-to-day operation and smooth running of the Society. The principal aspects of the role are: to administer the membership scheme, to undertake financial and accounting administration, to help organise events for members, and to provide high-quality office administration.
- Location:** Central London (with some home working possible).
- Salary:** £30,000 - £35,000 per annum (depending on experience), pro rata (3 days a week) + 6% pension contribution.

### Membership Scheme

To administer all aspects of the charity's membership scheme and to maintain the customer relationship management (CRM) system.

To enrol new members and deal with membership queries. To manage membership payments, renewals and bank reconciliations. To invoice institutional members and subscription agencies.

To make periodic Gift Aid claims.

To act as the person responsible for data protection and compliance with GDPR.

To liaise with the Society's publishers to ensure the timely dispatch of the membership magazine and other mailings and to co-ordinate commercial inserts.

To help organise and run the AGM, Annual Lecture and Autumn Visits (may require some out of hours working).

## Financial Management

To assist the Director and Treasurer in preparing annual budgets.

To keep financial records for the organisation, including providing monthly figures for the Treasurer.

To process payments and issue invoices where necessary.

To ensure financial records (invoices, bank statements etc) are correctly filed and duplicated where appropriate.

To send relevant records to the Society's auditor each year and to assist the Treasurer in producing accurate Annual Accounts.

To administer the payment of staff salaries and pensions.

To submit Inland Revenue Returns.

To maintain up-to-date staff records.

## Office Administration

To provide office support by answering the telephone, taking messages and replying to emails.

To order stationery, keep an up-to-date filing system and maintain equipment. To ensure the office operates in a health and safety compliant manner.

To act as a point of contact with the Society's IT consultant and to trouble-shoot simple IT problems.

To fulfil occasional orders for the sale of publications.

To help organise and to attend Council meetings and to take minutes.

To prepare reports for Trustee meetings, including membership reports and budget information.

To assist the Director in all administrative aspects of the Society's running.

## Person Specification

<b>Training, experience &amp; qualifications</b>	
<p><b>Essential:</b></p> <ul style="list-style-type: none"> <li>• Experience of financial and budget management.</li> <li>• Experience of managing databases.</li> <li>• Experience of dealing with suppliers and consultants.</li> <li>• Experience of operating IT systems and resources.</li> </ul>	<p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>• Interest in the historic environment.</li> <li>• Experience of using customer relationship management (CRM) systems.</li> <li>• Event management experience.</li> <li>• Experience of managing website updates and content.</li> </ul>
<b>Knowledge and skills</b>	
<p><b>Essential:</b></p> <ul style="list-style-type: none"> <li>• Knowledge and understanding of IT systems and resources.</li> <li>• Office management skills.</li> <li>• Experience of working for a small organisation.</li> <li>• Experience of overseeing contracts with suppliers and consultants.</li> </ul>	<p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>• Experience of using desktop publishing software.</li> <li>• Understanding of issues around GDPR and data management.</li> </ul>
<b>Personal skills and attributes</b>	
<p><b>Essential:</b></p> <ul style="list-style-type: none"> <li>• Excellent interpersonal, negotiating and communication skills.</li> <li>• Excellent team working skills.</li> <li>• Self-motivation.</li> <li>• Ability to work without direct supervision.</li> <li>• Excellent attention to detail.</li> <li>• Ability to problem solve / multi-task.</li> <li>• Ability to think creatively.</li> <li>• Good time management skills.</li> </ul>	<p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>• Awareness of the heritage sector.</li> </ul>