

# Role profile

**Job title: Membership Assistant**

**Reports to: Membership and Adoption Team Leader**

**Date prepared: March 2023**

## Purpose

To process and contribute to all RZSS membership and adoption administrative, financial and sales activities, ensuring income is processed accurately and on time, whilst providing high levels of customer service to all stakeholders.

## Scope

- Undertake office administrative activities, e.g. processing membership and adoption applications and renewals (Direct Debit, credit card, cash, cheque and other payment methods), and responding to letters, phone calls and emails.
- Undertaking the full financial processing of direct debits valuing over £100k per month. Including dealing with BACS submissions and daily reports.
- Responsibility for handling large amounts of sensitive personal and financial data.
- Support regular and ad-hoc membership and adoption campaigns at Edinburgh Zoo, Highland Wildlife Park and at off-site locations.
- Process in excess of 40,000 enquiries and transactions per annum collaboratively with the wider membership and adoption team.
- Responsibility for training those in visitor experience at both parks in membership sales processes and ensuring they feel empowered to answer any membership or adoption queries that arise.
- Act as an active customer service point for RZSS members over the phone, over email and in person.
- Proactively engage with lapsed or potential members to convert and upsell membership over the phone, over email and in person.

## Responsibilities

- Accurately process membership and adoption applications and renewals, adhering strictly to deadlines and in full compliance with GDPR requirements.
- Use and maintain membership and adoption databases to securely upload, extract and process data.
- Ensure all queries (email, phone, face-to-face) are answered within a reasonable timeframe and with first-class customer care.
- Provide high levels of customer service to both internal and external customers.
- Provide ad hoc admin support where required, e.g. post duties, mailings, donation processing. Responsibility for regular processing of sponsorship packages for development team.

- Create adoption pack materials using database exports, assembling the packs and processing the postage. Including post-Brexit international postage processes.
- Exporting adoption signs and distributing to enclosures throughout Edinburgh Zoo. Sending relevant signs to Highland Wildlife Park to be distributed.
- Assist with regular mailings for new and renewing members. Finding and exporting the correct information from the database, printing and packing letters and processing the postage.
- Attend events out with normal working hours on occasions as required with involvement in the organisation of the annual AGM.
- Complete processes accurately and on time to ensure income is processed, deducted from customer accounts and transferred to RZSS accounts within required time frames. Including processing daily BACS reports and monthly direct debit reports.
- Process and bank cheques.
- Support the Marketing and Membership Manager in developing membership and adoption activities.
- Engage with RZSS appraisal system, and demonstrate commitment to our values, behaviours and your continuous personal development.
- Ensure compliance with RZSS's policies, procedures and guidelines, together with all relevant regulatory and statutory requirements.
- Record Gift Aid declarations accurately and import the data correctly to meet auditing requirements.
- Perform other reasonable duties and/or projects as directed by your Manager.
- Assist the visitor experience teams at both parks with any member queries. Training these teams on membership sales processes and ensuring they have all the information required to be confident in resolving any queries that may arise.

## Knowledge, skills and experience

Knowledge	Essential	Desirable
Knowledge of Direct Debit and payment processes.		✓
Good achievement in standard grades (or equivalent), including English and maths.	✓	
Customer service qualification		✓

Skills	Essential	Desirable
Competent in the use of Microsoft Office (Word, Excel, Outlook)	✓	
Fast and accurate typing and inputting skills.	✓	
Strong written and verbal communication skills	✓	
Experience in using a Customer Relationship Management database. Access Charity CRM		✓
Accurate numerical reasoning skills and attention to detail.		✓

Experience	Essential	Desirable
Providing first class customer care and service, including dealing with customer complaints.	✓	
Skilled in communicating constructively with customers by phone, email and face to face.	✓	
Previous experience of administrative and data processing work.	✓	
Working within a fundraising or business development environment.		✓

## Behavioural competencies

Competency	Level	Essential	Desirable
Planning & Organising	Plan ahead, organise your work, take into account the potential for change.	✓	
Finding Solutions	Use your initiative to resolve problems and complaints, finding solutions within your work.	✓	
Delivering Services & Experience	Perform your role to the best of your ability with enthusiasm and a positive approach	✓	
Team Working	Be collaborative and seek to find a positive outcome for the team and for RZSS.	✓	
Communicating	Comfortable initiating dialogue with people; communicate with care to ensure your message is understood.	✓	
Projecting Confidence	Act in a way which projects personal credibility, inspires trust and helps you share your knowledge and experience.	✓	
Gathering Information	Gather and analyse information relevant to the tasks in your role.	✓	
Developing Talent	Take responsibility for your performance and career development.		✓

## Role dimensions

### Planning and Organising

- Plan and prepare own workload daily to ensure tasks are completed within a timely manner.
- Ensure all membership and adoption customer enquiries and applications are processed within required time frames.
- Work collaboratively to prioritise departmental activities to ensure all new and renewing membership and adoption applications are uploaded to RZSS databases before end of month counts are taken.
- Ensure essential daily reports, such as BACS cancellations, online SagePay reconciliation and card machine Z reports, are processed in a timely manner.
- Ensure all planned and ad-hoc data membership processing and recruitment requirements are provided by agreed deadlines.
- Daily checks of data automatically imported into the database from the website and rectifying or flagging any anomalies.
- Ensuring CRM data is correct and meets GDPR regulations. Deduplicating the continuously imported data from ticket and membership online purchases.

### Communication and relationships

- Deliver a first-class service culture and know when to adapt style as appropriate.
- Respond to queries from existing, lapsed and potential members and adopters through a wide range of channels, including face to face, digital, by phone and in print.
- Contribute to promotional materials e.g. proofreading LifeLinks membership magazines and event invitations.
- Engage with current and prospective members and adopters to promote RZSS and our mission, e.g. at member and adopter events.
- Communicate collaboratively with other departments and volunteers to promote the benefits of membership and adoption to the Society.
- Work with education department to manage school adoption fulfilment and the events department for platinum adoption experience fulfilment.
- Assist the visitor experience teams at both parks with any member or adopter queries. Training these teams on membership sales processes and ensuring they have all the information required to be confident in any queries.
- Communicate with and support peers in departmental processes and knowledge sharing sessions.
- Build positive relationships with external suppliers, e.g. on processing stationery orders.

### Problem-solving and decision making

- Respond to member complaints in a timely and professional manner, seeking advice from Membership and Adoption Team Leader or Manager where necessary.
- Follow departmental procedures for communicating standard messages to enquirers, e.g. using email templates to respond to questions in the membership inbox if required.
- Use initiative to respond to customer enquiries, judging the most appropriate method, seeking advice from Membership and Adoption Team Leader or Manager if required.
- Seek advice and guidance from senior colleagues to establish facts, e.g. animal births and animal welfare, to ensure RZSS is accurately represented.

- Using knowledge and experience to solve or identify any database errors or system improvements. Seeking assistance from the Membership and Adoption Team Leader or raising issues that need further investigation.

## Other information

I have discussed and agreed this updated role profile with my manager

Name:

Signature:

Date:

