**Position Description**

**MEMBER RECORDS MANAGER**

**General Statement of Duties:**

This position performs administrative tasks for the North Carolina Retired Governmental Employees’ Association (NCRGEA) members, including all member actions, such as payment processing, member demographic updates, and member communications.

**Distinguishing Features:**

The Member Records Manager is responsible for membership and database support for the Association. Work involves daily processing of membership enrollments and dues payments and performing routine operations within the database to ensure accurate member records. Work requires attention to detail and accuracy in processing membership payments to provide quality payment reconciliations and member analysis reporting. This position reports to the Director of Association Business and Operations.

**Illustrative Examples of Work:**

* Demonstrates a solid understanding of the intricacies of NCRGEA database operations.
* Manages all general membership records. Updates demographic and status changes. Updates records with change of address reports and bounced/unsubscribed email reports. Conducts online research and contacts members as needed to verify demographics.
* Processes renewal and enrollment payments via check, credit card, and pension deduction; posts payments accurately to member records; and creates deposit reports.
* Captures online enrollments, confirms membership eligibility, and updates member records.
* Assists with the reconciliation and auto-posting of recurring credit card payments.
* Manages monthly import and export of reports to and from the NC Retirement System, including new retiree data, payment advice, and error reports. Provides new retiree data for marketing needs. Uploads membership error reports to the database. Provides reports to AMBA for reconciliation of benefits. Reviews error reports and contacts members regarding non-payment. Reconciles pension deduction reports, matching database expectations to actual receipts from the Retirement System. Troubleshoots and resolves discrepancies.
* Maintains written membership administrative process and procedures manuals.
* Assists with phone reception and member services inquiries as needed.

**Knowledge, Skills, and Abilities:**

* Excellent member service and problem-solving skills.
* Sound working knowledge of databases, membership record practices, and accounting procedures.
* Strong ability to work independently, establish priorities, and meet required deadlines.
* Ability to adapt to changing systems and processes. Creativity in conceiving, evaluating, and implementing more effective procedures and workflow.
* Ability to handle funds accurately and make mathematical calculations.
* Ability to communicate effectively in oral and written forms.
* Skilled in the use of computers and general office equipment.
* Proficient in Excel, Word, and other Microsoft software.
* Preferred knowledge of and experience with customer relation management and association management software.
* Ability to process records accurately and on time.

**Desired Education and Experience:**

This position requires an associate’s degree or higher in accounting, business management, or a related field, and four years of working experience in a comparable-sized organization. An equivalent combination of education and experience will be considered.

**SCHEDULE OF ROUTINE ACTIVITIES**

**Daily:**

* Accurately post renewal and enrollment payments to members’ accounts; prepare deposits and reports; take deposits to the bank.
* Process online enrollment/renewal payments.
* Respond accurately to members’ inquiries consistent with the Association’s mission, programs, benefits, and partner relationships.
* Provide analytic reports as requested.

**Weekly:**

* Reconcile weekly membership reports, including new members and renewals.

**Monthly:**

* Create and save membership metric reports.
* Create and save prospective member reports.

**Annually:**

* As outlined in the Procedures Manual, conduct necessary annual processes.

**As Needed:**

* Maintain and update Membership Services Procedures Manual.
* Provide membership data for marketing purposes.
* Assists in generating email and mailing lists.