

## ROLE PROFILE

**Job title:** Institute of Money Advisers Administrator  
**Date:** January 2019

<b>Salary:</b>	Starting at £17,981 p.a. (rising to £20,254).
<b>Reporting to:</b>	Training Manager, or Membership, Marketing & Communications Manager.
<b>Role purpose:</b>	To provide efficient and effective administrative support to the Institute of Money Advisers.
<b>Key accountabilities</b>	<b>Key elements/tasks</b>
<b>1. Administrative assistance</b>	<p>Provide administrative assistance within the IMA team, including:</p> <ul style="list-style-type: none"> <li>a) dealing appropriately with telephone, email and other enquiries from members and non-members;</li> <li>b) word processing, transcribing, data entry and drafting of routine correspondence;</li> <li>c) collation, production and distribution of documents and information;</li> <li>d) maintaining up to date customer database information and producing statistical reports;</li> <li>e) production and distribution of paperwork for meetings and events, taking meeting minutes as required;</li> <li>f) booking rooms, liaising with attendees, arranging catering and so on in relation to meetings and events;</li> <li>g) making team travel and accommodation bookings;</li> <li>h) supporting the Finance &amp; HR Manager regarding invoices and payments owing to the IMA.</li> </ul>
<b>2. Office systems</b>	<p>Ensure arrangements are in place to support the smooth operation of the office, including:</p> <ul style="list-style-type: none"> <li>a) developing and maintaining office systems and processes necessary to support the work of the IMA, making appropriate use of IT;</li> <li>b) maintaining and operating quality assurance systems;</li> </ul>

	<ul style="list-style-type: none"> <li>c) providing support to new staff in administrative systems and procedures;</li> <li>d) IT housekeeping, reporting and monitoring of IT problems, and first-level IT support to others in the office;</li> <li>e) publishing information on the IMA website;</li> <li>f) developing and maintaining information resources.</li> </ul>
<p><b>3. Specific responsibilities</b></p>	<p>Take specific responsibility for some or all of the following:</p> <p><b>Qualifications and Continuing Professional Development</b></p> <ul style="list-style-type: none"> <li>a) administration of enrolment and related qualifications processes, including compilation of vetting information and assistance with marking and grading</li> <li>b) administration of the IMA CPD scheme</li> </ul> <p><b>Training</b></p> <ul style="list-style-type: none"> <li>a) assisting in the planning and organisation of training events, including production of training brochures</li> <li>b) liaising with trainers, issuing training contracts and collating training performance data</li> <li>c) maintaining an up to date library of training materials</li> </ul> <p><b>Membership</b></p> <ul style="list-style-type: none"> <li>a) administration of membership applications, cancellations, renewals and access to membership benefits</li> <li>b) process Quarterly Account subscriptions</li> </ul> <p><b>DRO Competent Authority</b></p> <ul style="list-style-type: none"> <li>a) administer Approved Intermediary authorisation and renewals procedures</li> <li>b) support the efficient running of the IMA's DRO Approved Intermediary function</li> </ul> <p><b>Marketing and communications</b></p> <ul style="list-style-type: none"> <li>a) undertaking proof reading and basic desktop publishing work;</li> <li>b) carrying out mail-shots and other marketing, including customer surveys</li> </ul> <p><b>Annual Conference</b></p> <ul style="list-style-type: none"> <li>a) provide administrative support to conference organisers</li> <li>b) contribute to the smooth-running of the conference, including attendance at the event, as required</li> </ul>

	<p><b>Networking and Information Sharing</b></p> <ul style="list-style-type: none"> <li>a) support regional money advice groups</li> <li>b) disseminate information to advisers</li> <li>c) administer digital website content</li> </ul>
<b>4. Other</b>	<ul style="list-style-type: none"> <li>a) commitment to understanding and working towards achieving organisational objectives</li> <li>b) compliance with IMA policies and procedures, including strict confidentiality and data protection requirements</li> <li>c) contributing flexibly as part of the team to assist in the smooth-running of IMA services</li> <li>d) undertaking any other duties as may be reasonably required within the scope of the role.</li> </ul>

### **PERSON SPECIFICATION**

1. Ability to provide administrative support in a busy office environment, including developing and maintaining effective office systems.
2. Ability to use IT packages, including word processing, spreadsheets, databases, web-publishing, and the ability to use email and to maintain an electronic diary.
3. Strong verbal and written communication skills, including the ability to draft correspondence and other documentation and to deal effectively with a wide range of people face-to-face, by telephone and in writing.
4. Ability to plan and organise own work to meet deadlines under pressure.
5. Ability to work on own initiative and flexibly as part of a team.
6. An understanding of and commitment to equality and the positive value of diversity.
7. Ability to commit to and work within the aims, principles and policies of the Institute of Money Advisers, including those relating to confidentiality and data protection.