Job Description

Job Title: Membership & Data Assistant (maternity cover)

Weekly Hours: 28 hours per week over 4 days Monday-Thursday

Based At: Plumgarths, Kendal

Reports To: Head of Membership, Data and Systems Strategy

Job Purpose:
To provide administrative support to the Membership, Data and Systems Strategy Team. Carry out membership and donation processing. To provide a high level of customer service to both our supporters and internal colleagues.

Main Responsibilities and Accountabilities:

Dealing with communications: Respond to enquiries by mail, email, telephone and in person. Scan and allocate post in membership in tray. Downloading and saving membership and donation forms. Managing the membership inbox and dealing with queries from members. Printing and mailing post.

Records maintenance: Carrying out weekly and monthly archiving of Gift Aid records and Pledges. Managing the Leavers Letters process including return of surveys and updating of groups. Processing returned post. Following up Gift Aid queries; scanning, recording and attaching Gift Aid Declarations.

Supporter Administration: work with colleagues to:
- Process memberships, membership income and donations
- Cover Membership, Data & Systems Strategy Team colleagues' tasks during periods of absence
- Update supporter details
- Send supporter correspondence

Supporting the Trust

Support the Membership, Data & Systems Strategy Team with additional tasks as required

Any additional duties as outlined in the Trust's Annual Work Plan.

Any other duties that may reasonably arise from time to time.

All tasks and responsibilities to be carried out in accordance with the Trust's policies and procedures.

Date: October 2026

Person Specification

Post Title: Membership & Data Assistant – Grade 7

1. Qualifications & Experience:

The post holder will be expected to have qualifications and recent and relevant experience in the following areas:

		Essential	Desirable
1.	Previous experience of working in an administrative role in a busy office environment	•	
2.	GCSE English and Maths (Grade 4 or above), or equivalent qualifications, training, or demonstrable competence in these areas	•	
3.	Intermediate level experience of using Word, Excel and Outlook	•	
4.	Advanced level experience of using Word and Excel		•
5.	Experience of using a database system (we use Charity CRM)		•

2. Knowledge & Skills:

The post holder will have the following knowledge and skills:

		Essential	Desirable
1.	Good numeracy and literacy skills	•	
2.	Excellent customer service skills	•	
3.	Accurate data entry and attention to detail	•	
4.	Good organisation and planning skills	•	
5.	Ability to work independently with minimal supervision	•	
6.	Good problem-solving skills		•
7.	Understanding of data protection requirements		•

3. Personal Qualities

The post holder should have the following qualities:

		Essential	Desirable
1.	Enjoy providing excellent service to staff and our supporters	•	
2.	Be confident in handling confidential data	•	
3.	Have a flexible approach, able to respond to changing demands	•	
4.	Be willing to follow established systems and procedures	•	
5.	Work well within a team	•	