Job Description and Person Specification
Draft Date: Nov 2026
Benchmark Date:

Job Description:

Job Title	Finance Officer – Accounts Receivable
Reports To	Membership Services Manager
Responsible For	n/a
Directorate	Finance and Operations
Pay Grade	C
Full / Part Time	Full Time
Hours Per Week	35

Role Purpose

To provide accounts receivable finance support across the membership services team.
To provide detailed income reconciliations.

Core Responsibilities:

Finance:

1. To raise sales invoices and credit notes behalf of the membership services team.
2. To process all financial transactions on behalf of the membership services team.
3. To ensure all member related finance transactions are accurately processed to the member record in a timely manner.
4. To manage all member related insurance queries and transactions.
5. To provide timely reports to the membership / events team surrounding any arrears.
6. To respond to member queries surrounding their accounts.
7. To ensure finance processes within the CRM and Finance system are being adhered to.
8. To reconcile the income between the finance system and CRM system at the end of each month, ensuring any and all reconciling differences are remediated.
9. To manage and respond to all finance related queries.
10. To support year end audit by providing documentation as required.

Other:

1. To use a range of IT and software applications to a professional standard including MS Word, Excel, Teams, Outlook, PowerPoint and BASW's website and customer relations management system, with ability to learn additional office IT systems/functions quickly, as required.
2. To work under own initiative and delegated responsibilities as required and able to work collaboratively, creatively and effectively with teams and colleagues across the association and externally, contributing ideas and solutions to collective efforts.
3. To undertake additional duties commensurate with grade, role and capacity, as appropriate, within a managed overall workload.

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Person Specification:

Criteria	Essential	Desirable	How Identified
Qualifications / Education			
A degree or equivalent in finance, accounting or related field		✔	Application form/certificates
Experience			
Experience in financial systems software	✔		Application form/ Interview
Experience in CRM software		✔	Application form/ Interview
Experience in conducting detailed reconciliations with large volumes of data	✔		Application form/ Interview
Experience in producing reports through BI systems		✔	Application form/ Interview
Experience using Stripe		✔	Application form/ Interview
Experience running Direct Debit runs		✔	Application form/ Interview
Experience using banking software		✔	Application form/ Interview
Skills / Knowledge / Abilities			
Excellent knowledge of computer packages, including Excel	✔		Working assessment
Strong written and verbal communication skills	✔		Interview and working assessment
Ability to work under pressure	✔		Interview and working assessment
Personal Qualities			
Good communicator with excellent interpersonal skills	✔		Interview
Ability to work to the highest standard of professionalism and confidentiality	✔		Interview
Self motivated and well organised	✔		Interview
Equal Opportunities			
Full commitment to promoting Equal Opportunities	✔		Interview
Health and Safety			
Full commitment to promoting the highest standards of Health & Safety performance	✔		Interview