



Good governance for a strong Aotearoa New Zealand

Membership Advisor – CMP

Position Description | He Kōrero Mo Te Tūranga

Reports to:

Membership Experience Manager

Location:

Institute of Directors, Wellington

Job dimension:

Full-time / Permanent

Direct reports:

Nil

Role purpose | Te aronga o te tūranga

The **Membership Advisor - Chartered Membership Pathway (CMP)** plays a key role in bringing the IoD's membership strategy to life by supporting engagement and participation in the Chartered Membership Pathway. Our Chartered Membership is a significant milestone within the IoD's individual membership journey – a respected mark of governance experience, professionalism and commitment to ongoing development. Becoming a Chartered Member ensures our members meet the highest standards of governance and provides value and credibility to their Boards.

This role delivers exceptional customer service and seamless support, ensuring our members enjoy a positive, professional, and personalised experience throughout their membership journey with the IoD.

About us | Mō mātou

The Institute of Directors is the professional body for directors and is at the heart of Aotearoa New Zealand's governance community. We believe good governance has the power to positively transform organisations, business and communities.

We support and enable the governance community to add value to their organisations and wider communities by: connecting them through our 10,500 strong member network, supporting professional development and board effectiveness through our training and services, and research, advocacy and thought leadership that sets and improves the standards of governance.

Our values | Ā mātou uara

We are guided by our values of:

Māiatanga | Courage - We are bold and have the courage to do the right thing

Manaakitanga | Support – we are welcoming and show respect for each other

Whakatautetanga | Individual – we respect the value each individual brings

Kaitiakiatanga | Stewardship – we take responsibility of care

He pukenga wai | Learners for Life – We are learners for life and seek to share our knowledge

Key responsibilities | Ngā haepapa matua

Member experience

- Provide an excellent level of service to all members and customers, responding to information requests and enquiries with expert knowledge in a timely, professional and warm manner
- Assist the Membership Experience Manager in the retention of members, follow up on overdue memberships, provide an early warning system for changes in members reasons for leaving by proactively recognising themes coming through from members
- Assist the Membership Experience Manager with the on-going improvements to the day-to-day administration and function of all Membership services.

Chartered Membership Pathway

- Manage all required administration relating to:
 - Upgrades to Chartered Member and Chartered Fellow status for existing senior members and non-members, as identified by the Leadership team
 - Chartered Member upgrade forms, creating Chartered Member Assessment (CMA) and certificates and success letters eg CMinstD and CFInstD
 - Researching the Companies office and NZ Business Number websites to verify members directorships for upgrade, and adhering to the IoD's rules and constitution
 - Chartered Member and Chartered Fellow renewals of annual confirmation
 - Chartered Member and Chartered Fellow resignation requests
- Assist members with enquiries related to membership categories and CPD requirements

Chartered Member Assessment

- Provide a high standard of customer service for all candidates with confidence issues, helping to re-sit exams or resubmit assignments, keeping up morale, managing candidates expectations and suitability
- Assist with all administration requirements and for the assessment:
 - Coordinate all communications to Company Directors Course participants regarding CMA bundling
 - Collate all assignment pack orders, and exam times and record in Arena, Aspeq, Excel and CMA Diary
- Provide help desk support with Aspeq when candidates have issues booking, cancelling, or transferring
 - Manage the workflows of the markers/ and moderators, coordinating their availability for assignment marking
- Liaise with the Registrar to coordinate any responses to results, feedback statements or reviews for the assessment; identify and escalate issues when required

Membership database maintenance

- Ensure the membership database is secure, effectively maintained and accurate including:

- All membership records, data and updates are entered and accepted in a timely and accurate manner
- Input into the user manual for the membership database when required
- Organise and maintain relevant membership files and documentation

Membership reporting

- Assist Membership Experience Manager with gathering data and highlighting trends around membership, for the GM, Brand, Strategy & Engagement bi-monthly report to Council
- Assist Membership Experience Manager with lists, reports or statistics regarding membership as required from time to time

Accounts

- Reconcile CMA markers/moderators invoices, for inclusion in the accounts payment runs
- Complete processing of membership subscriptions as required including processing manual credit card payments online
- Generate credit notes and refund requests
- Complete adhoc invoicing and liaise closely with the Accounts team.

Online services

- Encourage members to use the website for services. Provide assistance to members to resolve issues including referring online technical issues to IT for resolution, personalised login issues and password reset assistance.

Membership team

- Work collaboratively with team members to enable back up support and cross functionality of membership tasks when required, ensuring continuity within the team.

General

- Contribute to a dynamic, high-performing and inclusive 'one team' culture that is focused on outcomes, impact, effectiveness and delivering value for our members and customers
- Prioritise the health, safety and wellbeing of self and direct reports
- Undertake other activities as are reasonably required to carry out the functions of the position.

Key relationships | Ngā hononga matua

Internal:	External:
<ul style="list-style-type: none"> • Senior Leadership Team • Branch managers • All IoD staff 	<ul style="list-style-type: none"> • Members • Prospective / potential members • Service providers • Suppliers

Person Specification | Mōu ake

Qualifications and experience

- Appropriate tertiary level qualification or experience in related roles
- 3+ years experience in an administration and/or customer service role in a professional setting – Previous experience in a membership organisation or with chartered professional programmes is an advantage but not essential

Required skills, knowledge and capabilities

- Proven customer service experience; has a professional manner, acts with integrity
- Well-developed interpersonal skills, can establish effective and collaborative working relationships within a small team and the wider organisation
- Well-developed written and oral communications skills, can confidently interact effectively with internal and external key stakeholders, including with members at a director and senior executive level
- Exceptional attention to detail and accuracy; a passion for excellence and high standards
- Sound judgement and problem solving skills
- Able to research and communicate the research in a style and level appropriate to the audience
- Ability to work autonomously
- An efficient well organised approach to work, able to prioritise and manage conflicting demands
- Excellent digital literacy in the Microsoft office suite and SharePoint. Database experience ideal but not essential
- Initiative, is service oriented, and is committed to improving service systems and service quality
- A strong focus on delivery of outputs

Key Competencies | Ngā tohungatanga matua

We put our members and customers first

Always act for the good of the IoD and our purpose to positively transform governance.

See things from our members' and customers' perspectives and design services and create solutions that meet their needs.

Goes the extra mile for our members and our customers - both inside and outside the organisation.

Monitor member and customer satisfaction and focus on fixing what's not working and improving their experience.

We are outcomes focused

Strive for excellence and look for better ways to do things.

Harness technology to drive continuous innovation, improvement and efficiencies.

Understand our financial drivers and commercial environment and make decisions that positively impact this.

Is adaptable and can refocus our work and our energy to what's most important.

Thinks outside the box, bringing creative ideas and solutions to problems.

We value teamwork & collaboration

Welcoming and respectful, valuing diversity of culture, belief, lifestyle, gender, orientation, ability, and thought.

Collaborative and team-focused, contributing ideas, solutions, and shared responsibility while recognising others' strengths and achievements.

Supportive and reliable, backing up colleagues and fostering a positive, constructive environment.

Open and constructive in addressing challenges, focusing on healthy resolution and issues rather than individuals.

We hold ourselves to high standards

Aim high, delivering quality work, and setting goals that drive performance.

Act with integrity by keeping commitments, speaking up for what's right, and using sound judgement

Stay curious and knowledgeable, seeking feedback, learning continuously, and applying insights to improve.

Show accountability by owning actions, recognising limits, and asking for support when needed.

We develop ourselves

Commit to growth through continuous development, learning, and reflection.

Build cultural competence by deepening understanding and behaviours towards and attitudes of Māori and their culture, as the indigenous people of Aotearoa New Zealand.

Embrace curiosity, openness, and adaptability, learning from both success and failure.

Share knowledge generously, acting as both teacher and learner, and seeking growth beyond comfort zones.

Authority | Rangatiratanga

The Membership Advisor - CMP has the authority to make decisions and carry out actions in all matters related to the responsibilities and deliverables of the position consistent with budget approvals.

Amendments to the responsibilities | He whakahounga ki ngā haepapa

The responsibilities of this position are expected to change over time as the IoD responds to the changing environment and commercial demands and requirements. This position description will be updated as required to reflect these changes. The incumbent will need the flexibility to adapt and develop as the environment evolves.

Dated

September 2025