

## **Job Brief: DOCAS Processing Team Member**

### **Introduction**

1. UNISON is Britain's largest public sector trade union, with over 1.3 million members working in the public services, private, voluntary and community sectors and in the energy services. We employ 1200 staff, approximately 370 at our national centre in Euston, Central London and the remainder in our twelve regions across the UK, including Northern Ireland.
2. Services associated with administration and management of an individual's membership including joining, subscription processing, changes etc are carried out by RMS Operations.
3. March 2009 saw the implementation of the new Income and Membership Processing Service (IMPS) Unit within RMS Operations, based in Manchester. IMPS is a single service resource for the provision of income processing and member services. IMPS initially ran services relating to membership applications via the UNISON web site and other subscription services, and is constantly expanding its portfolio of services. This unit integrates services previously carried out across different parts of UNISON.

### **Developmental**

4. The DOCAS Processing Team Member role is key to the efficient and successful delivery of income processing and member services.

The Team Member is managed, supervised and mentored by the DOCAS Coordinator.

5. The key aim of the IMPS Team is to support UNISON Objective 4: Developing an efficient and effective Union, by:
  - Assisting with the improvement of financial management
  - Improving organisational systems

### **IMPS Services**

Summary of DOCAS Processing Team Member tasks requiring coordination and allocation is as follows. Each team Member should, with appropriate primary and refresher training, be able to carry out any task listed below.

- DOCAS (Deduction of Contribution at Source: subscription payment automatically deducted from a member's pay): process DOCAS files to improve membership data.
- Join Online (at the UNISON web site) or On phone (via UNISON Direct) application processing prior to transferring the applicant into the main membership services system.
- National Employer processing: DOCAS file processing and data cleansing for National Employers

- Checking and validating data on a scheduled programme plus ad-hoc exercises.
- Lapsed members follow-up: making contact with lapsed members using the most appropriate method and updating the main membership services system.
- Dealing with ad-hoc queries from regional staff.

## DOCAS Processing TEAM MEMBER

### JOB DESCRIPTION

Reports to: DOCAS Coordinator

### **OVERALL SUMMARY**

To work within the IMPS Team in the provision services, as currently running and planned, and also services which may in future be added to the IMPS Team portfolio, in the areas of income processing, membership processing and general membership support.

### **Work Areas**

- Work within the IMPS Team on the delivery of services
  - Carrying out tasks as allocated so as to achieve performance targets as defined in the IMPS Operating Level Agreement (OLA) with UNISON.
  - To meet individual targets as defined.
  - To ensure that personal communication is effective so service delivery standards are maintained.
  - To advise the Team Coordinator if system training is required or system issues need to be escalated.
  - To participate in training and personal development reviews.
  
- Improvement in efficiency of operation of UNISON
  - To work as required with UNISON Direct, Regions and Branches thus optimising the performance of services.
  - To feed back any performance-related issues and recommendations for improvement of service delivery.

## DOCAS Processing Team Member Person Specification and Selection Criteria

UNISON is an equal opportunities employer, committed to providing equal opportunities regardless of race or ethnic origin, gender identity, family situation, sexual orientation, disability, religion or age (up to 65). This person specification is designed to help members of Interviewing Panels judge the qualities of interviewees in a systematic and consistent way and in accordance with UNISON's equal opportunities policy. It is given to all job applicants for information.

### Assessment code

**A – application (those elements in bold will be used in the first long list. Only those candidates who best meet both the highlighted and all other criteria will be shortlisted).**

**PI – panel interview**

**ST-- selection test**

Heading	Selection criteria	Assessment
<b>1. Thinking</b>	<b>1.1 An understanding of the importance of keeping membership records up to date.</b>	A & PI & ST
	1.2 Learning and Development: can demonstrate continuous personal learning development	A
	<b>1.3</b> Some knowledge and appreciation of database systems for large organisations	A & PI
	1.4 Completer-finisher mentality to ensure that open problems are finalised or escalated and time-critical calendar-based tasks are accurately completed	A & PI
	1.5 A willingness and ability to work with colleagues from Head Office, Regions and external organisations.	A
<b>2. Interpersonal and Communication</b>	<b>2.1 Excellent communication skills required to work successfully in a small and skilled team</b>	A & PI & ST
	<b>2.2 Ability to carry out tasks on a flexible basis as required by the Team Coordinator</b>	A & PI
	2.3 The ability to handle difficult queries with the general public in a controlled and appropriate manner	A & PI
	2.4 The ability to communicate effectively with “opposite numbers” in Regions and National Office to help them operate effectively	PI

<b>3. Initiative and Independence</b>	<p>3.1 Experience of prioritising own workload including</p> <ul style="list-style-type: none"> <li>• decision making within guidelines</li> <li>• following policies and procedures</li> <li>• escalating problems to management when appropriate</li> </ul> <p>3.2 Ability to work to set deadlines and to agreed service levels</p> <p>3.3 Ability to manage the workload effectively and to handle competing priorities</p>	<p>A &amp; PI</p> <p>PI</p> <p>PI</p>
<b>4. Resource management</b>	<p>4.1 <b>Experience of personal planning including</b></p> <ul style="list-style-type: none"> <li>• time management</li> <li>• working to calendar event plans</li> </ul>	<p>A &amp; PI</p>
<b>5. Physical Skills</b> <i>(with DDA modification where necessary)</i>	<p>5.1 <b>Keyboard skills</b></p> <p>5.2 Occasional light lifting of materials</p>	<p>A</p> <p>A</p>
<b>6. General knowledge</b>	<p>6.1 <b>An understanding of UNISON's aims and values</b></p> <p>6.2 <b>An understanding of and commitment to the principles of equality and democracy</b></p> <p>6.3 An understanding of the role of trade unions and the social and political environment in which the union operates</p> <p>6.4 <b>Comprehensive knowledge of ICT packages including Microsoft Office suite and particularly the ability to use Excel functions.</b></p>	<p>A &amp; PI</p> <p>A &amp; PI</p> <p>A</p> <p>A &amp; PI</p>