

UNISON

Regional and Branch Development Senior Assistant Officer Finance Department

Job Description

Grade: 5
Hours: 35 per week
Location: UNISON Centre or Remote
Reports to: Regional and Branch Development Officer

Overall Summary

The post will act as the deputy to the Regional and Branch Development Officer as part of small team engaged in providing financial advice and support to branches and regions in all matters relating to branch funding and data integrity, systems (OLBA), governance and good practice.

The role will be the second main point of contact for all Regional and Branch Development queries, as well as the cover for periods when the Regional and Branch Development Officer is unavailable.

Key Areas and Responsibilities

Branch Support

- Promoting effective financial management of branches and regions through financial reviews, data processing and analysis, and reporting.
- Investigating and troubleshooting financial issues at branches, regional, and national level.
- Preparing and consolidating accounts and annual returns and responding to queries from external auditors.
- Carrying out reconciliation and financial reviews to ensure accuracy of branch annual returns and data.
- Advising branch officers on financial and reporting matters to meet internal governance and regulatory requirements.
- Calculating branch funding percentages for the year by collaborating with systems and membership teams.
- Providing detailed financial forecasts to give a clear picture of branch expected funding levels.
- Ensuring accuracy and integrity of branch funding and finance data.
- Helping develop and implement branch and regional policies & practices.
- Making sure branches and finances adhere to UNISON policies and rules.
- Updating and maintaining handbooks and guidance on branch finance & governance.
- Delivering required training to officers at National, regional, or branch level.
- Preparing training materials concerning branch finance processes and systems (OLBA) and Members on-line expenses.
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Reporting & Analysis

- Analysing and composing reports and briefs based on the outcomes of National Committee work.
- Following up and implementing decisions arising from the national subscriptions committee, strategic committees, or other knowledgeable sources.
- Monitoring branch finances and activity, preparing regular reconciliations and reports for stakeholders.
- Developing well-defined, pertinent management information utilising KPIs and exceptions reporting based on major fiscal indicators.
- Organising and maintaining branch finance and governance systems.

General Finance Support

- Collaborating with the finance team to meet the work plan objectives and produce financial statements.
- Interacting with external entities (banks, service providers, local gov authorities) as required.
- Communicating with other teams at national or regional level on branch finances, returns, reporting requirements, policy and governance.
- Writing, revising, and updating finance documents, guidelines, and reports.
- Providing input and aiding in the creation and testing of OLBA and the members on-line expenses systems or processes.

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Person Specification

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. This person specification is designed to help the members of the interviewing panel judge the qualities of interviewees in a systematic and consistent way and in accordance with UNISON equal opportunities policy. It is given to all job applicants for information.

Critical Analysis Skills

- Manage enquiries related to finance and processes from branches.
- Ability to analyse how branch funds are distributed and how this influences the operations and initiatives of each branch.
- Analyse, filter, and develop solutions for issues to ensure compliance with regulations and internal governance.
- Generate clear, succinct documents, action plans, and guidance.
- Provide instruction and training materials to a variety of audiences.
- Conduct financial reviews of branch transactions, accounts, records, and returns.
- Analyse financial and statistical data and perform reconciliations.
- Ability to produce detailed forecasts on funding levels to individual branches.

Inter-personal & Communication Skills

- Work collaboratively across organisational departments.
- Adhere to data privacy regulations and remain cognizant of confidential information.
- Effectively communicate verbally and in writing.
- Deliver presentations and impart financial and non-financial information.
- Prepare reports, instructions, action plans, and guidance.
- Organize and manage records and files promptly.
- Collaborate with a variety of stakeholders.
- Provide guidance and support to branches on application for additional funding

Initiative and Independence

- Handle interactions with branches, regions, banks, and external organizations professionally and confidently.
- Act proactively to provide support where necessary.
- Assess situations and devise, arrange, and implement adequate solutions.
- Determine which matters calls for elevation to higher authority.
- Prioritize conflicting objectives and demands for maximum productivity.
- Exhibit versatility, initiative, and self-direction to reach predetermined objectives.

Resource Management

- Demonstrable experience of managing financial resources and high volume of critically important information.
- Office and desk work requires interpersonal contact with branches and regions, as well as casual visits to branches.
- Provide instruction to branch officers formally and informally.
- Manage confidential information in accordance with protocols, policy, and direction.

General Knowledge

- Demonstrate knowledge of financial principles and bookkeeping procedures.
- Familiarity with internal and external auditing elements.
- Experience in a data processing, recording, and reporting environment.
- Skilled in Microsoft Office applications.
- Proficient in process-driven operations and documentation.
- Understanding of data privacy requirements.