

# UNITED SERVICES UNION

## POSITION DESCRIPTION

<b>Position Title:</b>	MEMBERSHIP OFFICER	<b>Location:</b>	SYDNEY
<b>Occupant:</b>		<b>Division:</b>	Administration and Finance
<b>Reports to:</b>	ACCOUNTANT	<b>Date Prepared:</b>	2/9/2015
<b>Grade/Level:</b>	1	1 to 5	<b>Effective date:</b> 1/1/04
<b>Hours:</b>	35 HPW	<b>Roster system:</b>	9 day fortnight

### ORGANISATIONAL AND PURPOSE CONTEXT

**To input and maintain accurate records of all Branch Membership information and subscription payments and to respond to enquiries and produce reports on request.**

**To promote the image of the Union by being professional and efficient in handling members' enquiries.**

### KEY SELECTION CRITERIA

#### Essential

- Excellent and effective customer service demonstrating confidentiality, knowledge of procedures and attention to detail
- Ability to respond effectively to all customer enquiries and complaints
- Intermediate computer skills in online payment systems, MS Office, data bases and email
- Accurate data entry, record keeping and reconciliation of daily financial transactions
- Excellent time management skills
- A demonstrated ability to work within a team environment and to work unsupervised when required
- The ability to interact effectively with all levels within the organisation
- Demonstrated understanding of and ability to deal with equal employment opportunity discrimination and harassment issues
- An understanding of WH&S issues relating to the workplace.

#### Desirable

- Previous experience with online banking systems
- Previous experience with Stratum membership database or similar
- Previous experience in call centre or receptionist role
- Knowledge of the Union, its structure, political and social impacts

### 3. Relevant Position Information

- this position is located at the Sydney Office servicing new and existing members,

- the position operates on 35 hours per week and is subject to a nine (9) day fortnight roster period.

#### **4. Work Health and Safety Responsibilities**

##### **Employees**

Must take all reasonable care of the health, safety of themselves and other persons at the workplace, use equipment, or wear personal protective clothing, required by the Union and comply with legislative requirements and the Union's policies and procedures dealing with Work Health and Safety.

#### **5. Equal Employment Opportunity Responsibilities**

##### **Employees**

Must take all reasonable measures to ensure they do not discriminate against or harass other employees, or customers and that they comply with Equal Employment Opportunity legislation requirements, and the Union's policies and procedures dealing with Equal Employment Opportunity.

#### **6. DUTIES**

- Process member records for new and resigned members
- Process daily bulk member payments by direct debit, credit cards, cheque, BPay
- Process individual payments by direct debit, credit cards, cheque, BPay
- Reconcile Stratum payment records with bank statements (day book)
- Take cheque payments to bank
- Distribute incoming mail
- Process payroll deduction data from employers into a form compatible with allocation into Stratum using various methods including Excel macros
- Respond to member enquiries in relation to all aspects of membership records and payments
- Process mortality benefits
- Maintain document management by scanning original documents into Stratum
- Process all union picnic applications and manage the appropriate documents, reports and payments where necessary.
- Follow up with declined credit card and direct debit payments.
- Initiate correspondence relating to expiring credit cards, change of banking details, change of personal details and other issues as required via email, post, phone or SMS
- Process return to sender mail
- Validate member addresses using QAS
- Produce quarterly statements
- Produce payment summaries for tax purposes
- Manage bulk mailouts using folding machine
- Assist with development of procedure documentation
- Report technical or procedural issues to supervisor and /or management
- Respond to requests for information from organisers, staff and management and produce reports as required.
- Deal effectively with complaints from internal and external customers

- Work within a trade union context
- Follow WH&S policies and procedures appropriate to the position
- Follow USU policies and procedures
- Relieve Reception

## Competencies

These competencies encompass all competencies associated with the USU salary system progressional rules.

Competency Code	Unit of Competency
	<b>Common Units</b>
	<b>Communication</b>
BSBCM103A	Apply basic communication skills
BSBCM203A	Communicate in the workplace
BSBCM405A	Analyse and present research information
	<b>EEO</b>
BSBCM315A	Work effectively with diversity
	<b>Finance</b>
BSBCM207A	Prepare and process financial/business documents
BSBCM308A	Maintain financial records
	<b>WH&amp;S</b>
BSBCM106A	Follow workplace safety procedures
BSBCM211A	Participate in workplace safety procedures
BSBCM109A	Follow environmental work practices
BSBCM215A	Participate in environmental work practices
	<b>Services</b>
BSBCM208A	Deliver a service to customers
BSBCM209A	Provide information to clients
BSBCM216A	Create customer relationship
BSBCM217A	Process customer feedback
BSBCM310A	Deliver and monitor a service to customers
BSBCM316A	Process customer complaints
BSBCM317A	Meet customer needs and expectations
BSBCM409A	Promote products and services
BSBCM418A	Address customer needs
	<b>Training</b>
BSBCM104A	Plan skills development
BSBCM210A	Implement improved work practices
BSBCM301A	Exercise initiative in a business environment
BSBCM302A	Organise personal work priorities and development
BSBCM304A	Contribute to personal skill development and learning
	<b>Work Practices</b>
BSBCM108A	Develop keyboard skills
BSBCM201A	Work effectively in a business environment
BSBCM202A	Organise and complete daily work activities
BSBCM204A	Work effectively with others
BSBCM205A	Use business technology

Competency Code	Unit of Competency
BSBCM206A	Process and maintain workplace information
BSBCM212A	Handle mail
BSBCM213A	Produce simple wordprocessed documents
BSBCM214A	Create and use simple spreadsheets
BSBCM306A	Produce business documents
BSBCM307A	Maintain business resources
BSBCM318A	Write simple documents
	<b>Assessment and Workplace Training</b>
BSZ404A	Train small groups - Non-accredited course
	<b>E-Business</b>
BSBEBUS301A	Search and assess online business information
BSBEBUS302A	Use and maintain electronic mail system
BSBEBUS308A	Maintain online business records
BSBEBUS401A	Conduct online research
BSBEBUS405A	Conduct online financial transactions
	<b>FINANCIAL SERVICES</b>
FNBFIN60A	Prepare match and process receipts
FNBFIN61A	Prepare and bank receipts
FNBFIN63A	Process payment documentation
FNBFIN65A	Process journal entries
FNBFIN66A	Reconcile and monitor accounts receivable
	<b>Frontline Management</b>
	<b>Work Teams</b>
BSBCM404A	Develop teams and individuals
	<b>Systems &amp; Processes</b>
BSBCM412A	Promote innovation and change
	<b>Recordkeeping</b>
BSBRKG301A	Control records
BSBRKG303A	Retrieve information from records
BSBRKG304A	Maintain business records
BSBRKG401A	Review the status of a record
BSBRKG402A	Provide information from and about records
BSBEBUS406A	Monitor and maintain records in an online environment
	<b>Specialist Administration</b>
BSBADM302A	Produce texts from notes
BSBADM305A	Create and use databases
BSBADM309A	Process accounts payable and receivable
	<b>Unionism</b>
BSBUN405A	Promote the values, principles and policies of the union

## 8: Signatures

**Job Occupant:** ..... **Date:** .....

**Divisional  
Manager:** ..... **Date:** .....