

The Educational Institute of Scotland

ACCOUNTANT (MARCH 2019)

Further Particulars

The Organisation

The Educational Institute of Scotland is the largest trade union for teachers and lecturers in Scotland with 57,000 members in nursery, primary, secondary, special, further and higher education. Its national HQ is based in Edinburgh and there are Area Offices located in Dundee, Edinburgh and Glasgow.

Organisational Structure

The organisational structure comprises an annually elected Council of 139 lay members, from which are elected five national committees – Executive, Education, Employment Relations, Equality and Salaries. The principal unit of organisation is the Local Association whose boundaries correspond to those of local authorities in Scotland. There are also two self-governing associations for further education lecturers (Further Education Lecturers Association) and university lecturers (University Lecturers Association). Overall policy and strategy are set by the Annual General Meeting held in early June each year.

Officials

The Institute's Officials are headed by the General Secretary and, under current arrangements, there are 4 second tier Officials posts – a specialised Accountant and 3 Assistant Secretaries. The Officials constitute the Institute's senior management team. Additionally, there are 12 Officers of whom 5 are National Officers based at the Institute's Headquarters and 7 are Area Officers located in the various area offices. The Accountant acts under the general direction of and is accountable to the General Secretary for the discharge of the duties of their post. First-line management of the Accountant is undertaken by the General Secretary. The enclosed chart shows the **current** allocation of duties to the four second tier posts. This is subject to change and all 4 second tier Officials are required to work flexibly across the range of work required at this level.

Location

The successful candidate will be based in the Institute's Headquarters in Edinburgh. Candidates must be able to commute reliably to the centre of Edinburgh. However, candidates should be aware that appointment is to the service of the Institute and they may be required to transfer to another location within Scotland and/or to other duties or areas of responsibility commensurate with the grade of Accountant.

Principal Duties

Within the assigned areas of responsibilities, **which may be varied from time to time by the General Secretary**, the principal duties of this senior leadership post will include:

- preparation of the Institute's annual accounts, its annual return to the Trade Union Certification Officer (AR21), its annual planned expenditure (budget) statement, VAT, employee benefits, and Corporation Tax returns
- servicing the Institute's Finance Sub-Committee - agenda construction, preparation of reports, writing minutes and actioning outcomes
- overseeing, monitoring, and recording transactions in relation to the Institute's investment portfolio and related dealings with the various fund managers involved
- acting as Secretary to the employees' Pension Scheme including servicing Trustees' meetings, preparation of the annual report and accounts, the calculation of annual pension increases, and liaison with the scheme's actuary and other advisers
- various HR responsibilities including the servicing of the Appointments Forum which deals with all senior appointments, liaison with the employee trade union bargaining groups, development of policies and procedures, and provision of advice on staffing matters.
- overseeing the Institute's annual election procedures – Council, Committees and Sub-Committees – and the conduct of ballots as required
- advising the Institute's Employment Relations Committee on benevolence matters (assistance to members and former members suffering financial hardship) and the preparation of the Benevolent Fund's annual report and accounts for submission to OSCR
- managing and directing departmental staff (currently 10 employees)
- responsibility for the Institute's property management, insurance and certain membership benefit arrangements
- acting as a Director and Secretary of the Institute's own financial services company, EIS Financial Services Ltd

- advising, assisting, and where necessary acting for the General Secretary in the conduct of the Institute's affairs
- undertaking such other duties as may be allocated by the General Secretary from time to time

Essential Experience, Knowledge and Skills

1. Have experience of financial planning, budgetary control and accounts preparation/finalisation in a complex organisation.
2. Have strong management and leadership skills with experience of significant staff supervisory responsibilities at a senior level.
3. Excellent communication skills – writing reports and letters, speaking to individuals and groups (small and large), listening empathetically.
4. Be a fully qualified Accountant with one of the major UK Chartered accountancy bodies.
5. Proven record of working successfully with other people in a leadership role.
6. Ability to organise and plan own work schedule and priorities.
7. Proficiency in ICT skills including use of e-mail, internet and word processing.

It is also desirable for candidates to

1. Have previously worked in a large trade union or membership focused organisation.
2. Understand and demonstrate commitment to the principles of trade unionism.
3. Have pensions and/or charities experience.

Principal Terms of Employment

1. The post of Accountant is a permanent, full-time position currently based at the Institute's Headquarters in Edinburgh. The post-holder will report to and will be responsible to the General Secretary for the proper and efficient discharge of her/his duties.
2. The salary scale for the Accountant's post is £61,026 - £63,105 - £65,190 - £67,275 - £69,351. Incremental progression takes place at 1 April. Under the current agreement between the relevant union and the Institute these salary values are increased in line with movements in teachers' salaries. As there has been no agreement reached regarding teachers' salaries in respect of 2018/19 the scale shown above is that in operation at 31 March 2018. The present Accountant is retiring in August 2019 and the initial appointment will be as the Accountant Designate which will permit an overlap period enabling the successful candidate to familiarise themselves with both the duties of the post and the Institute itself prior to taking over as Accountant on 1 September 2019.

3. The successful candidate will be eligible to join the Staff Superannuation Scheme which currently provides a range of benefits, including age benefits at age 65, ill-health retirement benefits and death-in-service benefits. The employee's current contribution is 9% of salary. The Scheme provides for annual increases in pensions in line with RPI.
4. Appointment to the service of the Institute is subject to satisfactory references and criminal record checks.
5. Admission to the Superannuation Scheme is subject to evidence of good health.
6. Officials are entitled to 38 working days annual leave in the year beginning 1 September. Leave is taken subject to the requirements of the service and with the prior approval of the General Secretary. In addition, there are 12 Public Holidays which fall on specified dates and are to be taken subject to the requirements of the service.
7. Apart from Institute business undertaken out-with the office, Officials are expected to be in the office during core office hours which are 9.15 am to 12.30 pm and 2.00 pm to 4.45 pm from Monday to Friday. There is no specific stipulation made with regard to total working hours and Officials are expected to work such hours outwith the core office hours as may be required. There is no provision for overtime payments or time-off in lieu in respect of outwith office hours work.
8. Absence because of sickness is paid by the Institute on the basis of full salary for a period, followed by half salary for a similar period. Initial entitlement is for one month of full salary, followed by one month of half salary in any period of 12 months, rising after 5 years of service to six months of full salary and six months of half salary. Previous service as a teacher or lecturer counts in the calculation of an Official's entitlement to sickness allowance.
9. A mileage rate is payable in respect of business mileage undertaken. A subsidised loan facility is available to assist with vehicle purchase.
10. Where deemed necessary by the Institute, assistance with relocation costs will be provided subject to an upper limit of £3,500.

Appointment Timetable

The closing date for receipt of applications is 12.00pm on Tuesday 26 March 2019. It is envisaged leeting will take place on 2 April 2019 and that interviews will be held on Friday 12 April 2019.