Position Overview

The Secretary-Treasurer is an elected officer of Unifor Local 531 and is responsible for maintaining accurate financial records, ensuring proper management of Local Union funds, and handling administrative duties in accordance with the Local Union By-Laws and the National Constitution. The Secretary-Treasurer serves as a key financial liaison between the Local Union, its members, and the National Union, ensuring transparency, accountability, and compliance in all financial and administrative matters. The Secretary-Treasurer plays a critical role in the financial integrity and administrative function of Unifor Local 531, requiring diligence, transparency, and dedication to the service of its members.

Working Conditions

The Secretary-Treasurer role requires active participation in Executive Board and Local Union meetings, as well as attendance at Union-related events. Flexibility is essential, as duties may extend into evenings or weekends to meet reporting deadlines, conduct audits, or manage timely communications with members. Entrusted with highly confidential and sensitive information, the Secretary-Treasurer exercises the utmost discretion, ensuring the integrity, transparency, and effective administration of the Local Union. The role includes computer work and the filing comprehensive union records to manage the Local's administrative and financial functions

Key Skills and Attributes

- Strong understanding of accounting principles, bookkeeping, budgeting, and financial record-keeping, with the ability to track deposits, payments, dues, invoices, and reconcile accounts accurately.
- Proficiency with financial management software, databases, QuickBooks, Microsoft Office, and email systems to maintain secure electronic and physical records, generate reports, and manage correspondence.
- Exceptional organizational and administrative skills, including meticulous document management, prioritizing tasks, meeting deadlines, and working independently while collaborating with the Executive Board and members.
- Clear and professional written and verbal communication, with the ability to present financial information and explain complex matters to members in plain language.
- High ethical standards, discretion, and professionalism in handling sensitive financial and membership information.

- Analytical and problem-solving skills to identify discrepancies, trends, and potential issues, ensuring transparency, accuracy, and accountability in all financial matters.
- Commitment to supporting the union's mission, protecting members' interests, and upholding the integrity of the Local Union's operations.

Ongoing

- Maintain an inventory of all Local Union records and property, including purchase dates and amounts
- Maintain a complete record of all active members, including initiation, reinstatement, transfers, deaths, and other relevant membership information.
- Ensure all Local Union financial transactions are recorded accurately in the Local Union's books.
- Collaborate with other officers and the Executive Board to support Local Union operations and governance.
- Review and process all expenses submitted by the Executive Board and members in a timely manner.
- Deposit and safeguard all Local Union funds in accounts approved by the Executive Board and membership.
- Respond to requests from the National Union for information on membership, finances, and officers.
- Ensure all Local Union obligations to the National Union are met, including reporting membership changes, dues, and officer information.

Monthly

- Manage all local union income and money into designated bank, credit union, or trust accounts as directed by the Executive Board.
- Review the local union dues deposits from the National Union and identify any discrepancies
- Prepare financial reports summarizing income, expenditures, and balances for Executive Board meetings.
- Notify members in arrears of dues owed and maintain up-to-date dues records.

Quarterly

- Prepare and submit written financial reports for the General Membership Meetings detailing income, expenditures, and balances in each fund.
- Provide the Trustees with all necessary information and resources to effectively conduct their quarterly financial review.

Annual

- Ensure books are audited as required, turning over all records to the assigned auditor for review and approval.
- Provide the National Secretary-Treasurer with requested records for examination and audit.
- Review and update all member records, financial inventories, and historical data to ensure completeness and accuracy.
- Evaluate administrative processes for improvements in efficiency, transparency, and compliance.