

Job Description

My Position

Position:	Team Leader – Rates
Section:	Business Services & Rates
Group:	Strategy & Finance
Responsible to:	Business Services & Rates Manager
Responsible For:	• Rates Officer • Finance Officer - Rates • Finance Officer – Banking & Revenue
Job Purpose:	• Manage the process of invoicing of rates to ensure compliance and delivery within agreed timeframes. • Maintain a thorough understanding of relevant legislation and Council rating policy to ensure rating administration is in accordance with policy and legislative requirements. • Be a trusted source of advice and specialist knowledge to the Rates Officers, other staff and customers, including resolving more complex or sensitive enquiries. • Supervise and check rates remission applications processed by the Rates Officer. • To lead, support, coach and develop all members of the Rates team to be effective in their roles so that they contribute positively to the Council workplace. • Assist Team Leader – Business Services with collection of outstanding rates including rates penalties and follow up of outstanding accounts. • To oversee workflow of the rates administration team ensuring priorities are clear, work is appropriately prioritised and to provide support and assistance where required. • To manage Council's debt recovery in accordance with appropriate legislation and policy for rates debt • Undertake other assigned tasks that assist the revenue and finance team to deliver its goals and objectives. • To provide 2IC back up to Business Services & Rates Manager for the Rates Tasks

Our Council

Our District Vision:	Thriving and resilient Tasman communities <i>Kia manawaroa te tai o Aorere</i>
Our Purpose:	Delivering Public Value <i>Kia whai hua mā te marea</i>

Our Values

We support our Vision and Purpose through living our values.

Auahatanga – Innovation. *I orea te tuatara, ka patu ki waho. A problem solved by continuing to find solutions.*

- We love ideas, big or small
- We delivery differently
- We learn and grow
- We give it a go
- We are brave and challenge the status quo

Kawenga – Responsibility. *Kia ū ki te pai. Stay resolute to that which is good.*

- We honour our commitments
- We act professionally with integrity
- We are honest and open
- We bring the right attitude to work
- Safety and wellbeing come first

Manaakitanga – Caring/ Sharing. *Te tohu o te rangatira, he manaaki. The sign of a leader is how they support, protect and respect others.*

- Helpfulness and respect guide us
- Our mana encourages and lifts others up
- Care and empathy are a priority
- We are always welcoming
- We freely share knowledge

Whanaungatanga – Relationships. *He aroha whakatō, he aroha puta mai. If kindness is given then kindness shall be received.*

- We connect, listen and involve
- We believe in collective success
- Our stories create shared meaning
- We embrace diversity
- We are kind and nurturing

My Group

Role of the Strategy & Finance Group

The Strategy & Finance Group's primary purpose is to provide strategic and corporate planning, capital programme delivery, management of commercial activities, and fiscal stability and management of the Council's financial performance and reporting, rating and treasury functions.

The Group's work includes co-ordinating Council's Long Term Plans, Annual Plans, Annual Reports and Policies required by the Local Government Act 2002; preparing Council's plans and policy statements required under the Resource Management Act 1991; overseeing the development of the Future Development Strategy, Growth Strategy and Activity Management Plans; and undertaking reserves and recreation planning.

We achieve this by demonstrating the principles of Te Tiriti, investing wisely in infrastructure, people, and tools and by respecting, supporting, and enabling others. Our systems, oversight and advice empowers our Council and our communities to make wise and enduring decisions.

My Priorities

What am I supposed to do?	How well am I supposed to do it?
Rates Instalments • Manage quarterly rates assessments invoicing process ensuring they are processed accurately and within required timeframes.	Rates Instalments • Instalment notices are sent out on a timely basis every quarter. • Invoices and assessments meet legislative requirements and are error free.
Rates Database Maintenance & Reporting • Accurately supervise and maintain the rating information database. • Ensure all rates are applied correctly according to legislation and council policy. • Provide training and support for Rates Officers and Finance Officers on the rating database. • Update procedures and documentation relating to the Rating database. • Reconcile valuation with Council's valuation provider data on a monthly basis. • Ensure the maintenance of rate codes, rate amounts, and rating factors is completed	Rates Database Maintenance & Reporting • Monthly reports are produced on capital value variances in balances between the Council records and Quotable Values records with variances investigated. • Revenue records and databases are maintained accurately and are consistent with best industry financial practice standards and legislative requirements. • Subdivisions are accurately processed in accordance with policy and legislation. • Changes to customer records are accurately processed (e.g. address changes, pans, etc.)

accurately and in accordance with policy and legislation. • Process updates from Council's valuation provider on a timely basis. • Manage the process for the set-up rating for property subdivisions accurately and in accordance with policy and legislation ensuring that subdivided property rates are collected, direct debits are cancelled, and assessment is archived. • Ensure water rates records are maintained and reconciled to Council water accounts. • Perform systematic review processes to ensure rates are being correctly charged, and report to the Business Services & Rates Manager on outcomes. • Preparation of rates reports as required. • Maintain other sundry master data related to rates e.g. the street table. • Keep database up to date regarding annual cancelation/archiving processes.	• Changes to system information (e.g. street tables) are accurate and systematic. • Ongoing review of rate types and factors occurs. • The Business Services & Rates Manager is provided with regular reports on the status of rate type audits and customers are notified of any adjustments required. • Tasks are undertaken with a high degree of accuracy, efficiency and timeliness.
Rates Remissions • Ensure rates remission policies are correctly applied from application to final remission of rates on customer's account. • Provide support to the Business Services & Rates Manager on changes to policy.	Rates Remissions • Rates remission applications are administered accurately, in a timely manner and in accordance with Council policy.
Debt Management and penalties • Perform debt management processes including corresponding with and discussing overdue accounts with customers as required. • Perform the rates arrears penalty process on a biannual basis in accordance with Council Policy • Perform annual debt management mortgagee procedures in a timely manner and ensure ratepayers without a mortgage are referred to debt collection • Proactively monitor account balances to ensure receipts are processed correctly and to appropriate accounts. • Liaise the Council's debt collection agent regarding the status of individual accounts. • Maintain relevant flags in the database relating to the debt status of accounts. • Assist with the development and review of debt management procedures and up-front risk mitigation processes. • Contribute to ongoing process improvement that will speed up collections and minimise risk of write offs. • Provide documentation for court processes for recovery of debt. • Liaise with external legal firms as required on debt collection processes. • Actively follow up and encourage the use of direct debit and/or payment plans as appropriate to minimise use of the debt collection agency.	Debt Management and penalties • Active collection strategies are employed to reduce the level of arrears. • Debt management procedures are completed on a timely basis and in accordance with policy. • Processes improvement is evident in accordance with best practise guidelines. • Debt collection levels across all revenue streams are improved on a year on year basis. • Increasing numbers of customers are electing to sign up for direct debits. • Arrears penalty runs are processed accurately and in accordance with Council policy and customers are notified in a timely manner. • Debt recovery procedures are carried out in accordance with Local Government (Rating) Act 2002
Rating Legislation and Policy • Maintain a thorough understanding of the Local Government Act 2002 (as it pertains to rates), the local Government (Rating) Act 2002, Councils Rating related policies including its Rates Remission Policies, and its Funding Impact Statement, Rating Valuations Act 1998, Rating Valuation Rules 2008	Rating Legislation and Policy • Rating database is maintained in accordance with legislation and related Council policy. • Compliance with legislated responsibilities and timeframes is evident.

Complete tasks required by legislation, including the May notification of the RID.	
Rates & Customer Database Administration - Ensure Finance Officers perform accurate direct debit administration including setting up and maintenance of direct debits and following up dishonours. - Ensure Finance officers maintain the customer and rates database through accurate processing of sale notices, ratepayers' notices of postal address changes and emails. - Ensure the rates rebate batch submission and payment processes are completed and reconciled. - Assist Finance Officers to carry out other general rating administration as required including transfers between accounts, rates adjustments journals, business rate payments, etc. - Provide training, documentation and advice relating to legislation to assist Finance officers to carry out maintenance of Customer Database records. - Maintain working relationship with QV (our valuation service provider).	Rates & Customer Database Administration - Direct debits are processed and/or updated accurately and on a timely basis and direct debit dishonours are followed up in a timely manner. - All database information is updated and changes are accurately processed in accordance with agreed timeframes and standards. - Identified issues and problems are resolved within agreed timeframes. - Rates rebates are processed efficiently and according to agreed timeframes. - Tasks are undertaken with a high degree of accuracy, efficiency and timeliness.
High Quality Customer Services - Handle queries from staff relating to revenue and rating matters. - Handle and resolve more complex, technical and sensitive customer enquiries and maintain confidentiality. - Ensure all inwards correspondence is replied to in a timely manner. - Ratepayers / solicitors receive accurate and informative information about their rates obligations. - Ensure customer service requests referred to the section are effectively managed in accordance with the Council's procedures. - Attend to customer calls, drop in visits, letters and emails as required. - Record requests for service in service request systems as appropriate and escalate enquiries according to agreed procedures. - Add value" when responding to customer enquiries.	High Quality Customer Services - Inward correspondence is processed and replied to in accordance with the Council's timeframes and other policies. - Job holder is available and responsive to customers and their enquiries with the majority of requests responded to and resolved first time. - There is a high level of customer satisfaction with the services provided by Council. - Improved rate-payer/customer perception of Council's performance is evident. - Requests are managed in accordance with Council procedures and promote customer satisfaction. - Positive feedback confirms that the section's customer response meets the Council criteria. - Systems are maintained, updated and reported as necessary. - Customers are contacted within specified timeframes to update their status and provision of related information adds value.
Systems Support and Liaison - Ensure documentation, standard operating procedures, desk files etc associated with the role are effectively maintained and kept up to date. - Train section staff in standard processes as required. - Communicate with the Business Services & Rates Manager to enable effective management and prioritisation of tasks. - Train other staff throughout Council in standard rates processes as required.	Systems Support and Liaison - Processes are documented to ensure that training, auditing, maintenance, role hand-over, and other tasks can be easily carried out. - Backups are able to function effectively because of thorough documentation and training provided. - Current status information and other support is provided to the Business Services & Rates Manager in a timely manner. - Staff throughout Council have improved understanding of rates team functions.
Rates Administration Team Workflow, Support and Training - Communicate effectively with the other members of the revenue team on a daily basis to ensure daily workflows are optimised and perform various rates team functions when workloads require (e.g. rates administration, direct debit administration). - Contribute to ongoing process improvement across the Rates Administration Team functions.	Rates Administration Team Workflow, Support and Training - Workflows and team priorities are clear to all team members and work is appropriately prioritised - Responds positively to opportunities to provide advice and assistance as required. - Takes an active approach to own workload management by using good systems to track

• Provide appropriate development, technical input, mentoring, coaching, peer review, quality checking, feedback, and internal training opportunities to direct reports.	work demands and deadlines and has clear discussions about priorities with the Business Services & Rates Manager and other rates team members. • Leadership that inspires and motivate others to perform well is evident. • Regular performance feedback that encourages growth and development of staff is evident. • The Council's Values and expected behaviours are championed by being a positive role model at all times.
Finance Section Support • Undertake assigned tasks and provide administration assistance to the revenue team as directed by the Business Services & Rates Manager. • Assist the wider finance section by undertaking assigned tasks and administration as requested.	Finance Section Support • Assigned tasks are undertaken with a high degree of accuracy, efficiency and timeliness with priority given to urgent work. • Job holder responds positively to opportunities to work collaboratively with other Finance staff.

My Leadership	
Team Leadership & Engagement • I act as good role model, am an enabler of change and demonstrate a leadership style that creates a positive environment that fosters, develops and promotes engagement and collaboration. • I create a team culture of fairness and belonging, where all members of my Section are and feel valued. • I provide opportunities for my team to participate and be included in decision making that may impact on their individual or team performance outputs. • I openly celebrate success and tell the stories around how problems are identified and resolved.	
Team Performance Management • I effectively lead, enable and hold others accountable for delivering on our Section work programme and Council's strategic goals and performance objectives. • I provide effective support and proactively assess my team's workload and reallocate workloads when needed. • I make sure my team understand their statutory delegations and apply these correctly. • I make sure reports to Council prepared by my team meet the expected standards and format. • I understand the data and information generated by my team is an important Council asset and I use this data and systems to drive performance, quality decision-making and improved service delivery.	
Team Professional Development • I make sure everyone in my team has clear annual performance goals and measures that are aligned with Council's strategic goals, and I meet with them regularly to discuss and review progress. • I have regular development, mentoring, coaching, feedback performance conversations with my team, I understand their career goals and encourage participation in appropriate training opportunities. • I make sure appropriate succession planning is in place for my team and there are clear links to individual's career development plans.	
Team Recruitment & Induction • I take an active responsibility for the recruitment of the 'right person in the right job'. • I actively participate in and ensure quality induction, training and ongoing socialisation is provided to new members in my team.	

My Contribution	
Accountability • I take responsibility for my performance, decisions and actions and how these impact on others. • I take ownership of my wellbeing and health and safety responsibilities and seek support if I need it. • I take responsibility for ensuring the digital information, data and records created from carrying out my role are properly stored, maintained and retrievable. • I fulfil other assigned responsibilities, tasks and project work in a professional and timely manner.	
Customer Focus • I focus on the needs of our customers and provide all of them with outstanding service. • I treat all people with respect, and I deliver on the commitments I make. • My actions are fair and build trust with my colleagues, customers and our community.	

Relationship Building • I build and maintain genuine relationships with my colleagues, customers and our community. • I actively listen to others and are supportive, friendly and helpful. • I respect all cultures and act in ways that make others feel included and valued.
Resilience & Adaptability • I support new ways of working and are able to be flexible and calm when facing change or difficult situations. • I am digitally confident and participant in opportunities to learn how to apply digital business technology and tools to my work. • I am a willing contributor and participant in business process improvement solutions and other initiatives that enhance our service delivery.
Motivation & Drive • I take responsibility for my own learning and development and welcome feedback to improve my performance. • I effectively plan, manage and prioritise my work and deliver it on time. • I choose to bring the right attitude to work and I role model behaviours and attitudes that align with the Council's Values.
Collaboration & Inclusion • I actively contribute to the achievement of team goals and objectives. • I collaborate effectively with others and support my colleagues to achieve the Council's strategic goals and objectives.
Civil Defence Emergency Management • I provide assistance and support during civil defence / emergency management activities. • I participate in civil defence and emergency management training.
Working within te ao Māori • I have the appropriate level of knowledge and understanding of the principles and application of Te Tiriti o Waitangi for my role. • I have the appropriate level of knowledge of Tikanga Māori (customs and practices) and Te Reo Māori (Māori language) for my role. • I have the appropriate level of knowledge of Council's engagement protocols with the whānau, hapū and iwi of te Taihū for my role. • I foster a culturally inclusive environment by actively engaging with and respecting Māori perspectives and practices in my work.

My Delegations

I have delegated decision-making authorities and financial responsibilities for expenditure as listed in Council's Delegations Register. I also have staff responsibilities.

The Council may from time to time delegate to me other specified powers and duties, all of which I must exercise with due care and diligence.

My Competencies

My Qualifications and Experience:

- A Level 5 qualification in Finance, business or related field with minimum of three years post qualification experience in business, accounting, finance or similar (or studying towards)
- OR
- A Level 4 qualification in Finance, Business, or related field with a minimum, of 5 years post qualification experience in accounting, finance or revenue management.
 - Demonstrated experience leading, mentoring and developing team members to achieve high performance.
 - Local government experience is highly desirable
 - Experience in debt recovery or a similar customer focused function.
 - Strong financial, analytical and problem solving skills with experience interpreting legislation, policy and financial information.

- Experience managing complex or sensitive customer accounts and achieving positive outcomes.
- High level of digital literacy, including being a highly competent user of Microsoft Excel and the Microsoft Office suite, experience working with financial and database systems.
- Proven ability to work with a high degree of accuracy, attention to detail and apply sound judgement.

My Personal Attributes:

- A high level of interpersonal and communication skills to provide customers and stakeholders with clear precise information and accurate messages.
- Ability to remain calm, constructive and understanding when handling difficult customers, complaints and stressful situations so as to generate a positive image of the Council.
- Analytical approach with the ability to recognise future consequences of actions.
- Exceptional organisational skills and an ability to work under tight time constraints.
- Initiative and good judgement skills and a disposition to solving problems.
- An ability to relate to a wide range of people with relationship building skills.
- An active team member with a passion for quality customer experience, business outcomes, and continuous improvement.
- Excellent written and verbal communication skills
- Proven leadership skills and commitment to staff development, management, and mentoring skills with a strong commitment to teamwork.
- A proven commitment to quality customer service and teamwork.
- Flexible and change adaptive, quality and improvement focused.
- Ability to work with minimal supervision.

My Agreement

My Name:

My Signature:

Date: