

# FINANCE OFFICER - RATING

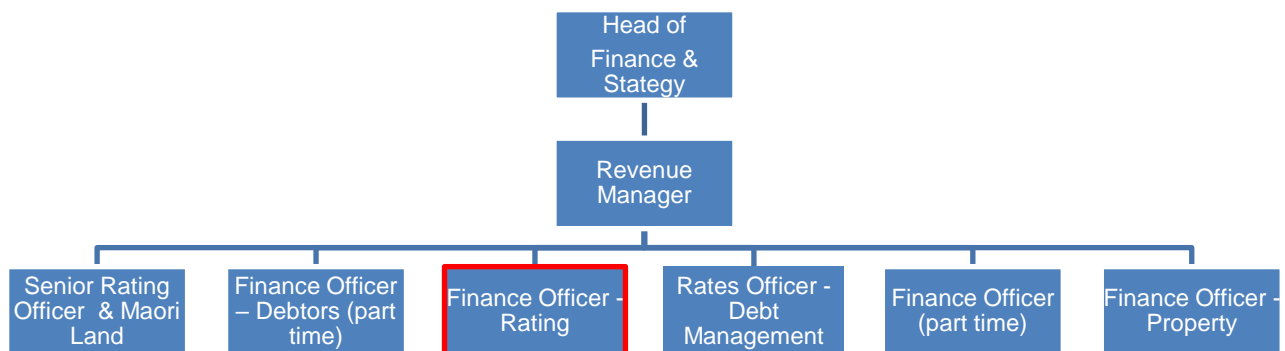
## POSITION DESCRIPTION

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### POSITION INFORMATION

<b>Group</b>	Finance and Strategy
<b>Team</b>	Finance
<b>Reports to</b>	Revenue Manager
<b>Direct Reports</b>	Nil
<b>Primary Location</b>	Taupo
<b>Financial Authority</b>	\$0

### TEAM STRUCTURE



### POSITION PURPOSE

This job exists to deliver rates administration and maintenance, produce invoices and assessments, create reports, process penalties and remissions, to give excellent customer service and manage the direct debit banking system.

## KEY RESPONSIBILITIES

Responsibility	Key Functions/outcome
Invoicing and Assessments	<ul style="list-style-type: none"> <li>Assist the Senior Rates Officer with:               <ul style="list-style-type: none"> <li>Running the instalments to assess the rates in the Rating Information Database</li> <li>Rates invoice and assessment forms are compliant with the Local Government (Rating Act) 2002</li> <li>Inserts are printed and issued</li> <li>Communicate and manage print-house liaison</li> <li>Stationary (including envelopes) is ordered in advance and stocks are managed</li> <li>Prepare and manage last day for rates media communication</li> <li>Prepare and disseminate annual TDC rates reports for budget managers</li> <li>Issue Waikato Regional Council rates assessment notices each quarter</li> </ul> </li> </ul>
Rating reports, administration and customer relationships	<ul style="list-style-type: none"> <li>Update and maintain the Rating Information Database and associated systems. Process journals to amend rates when required</li> <li>Use Council's reporting tools to maintain data and create databases as required</li> <li>Liaise with auditors as required</li> <li>Prepare and process rates journals for any rates amendments</li> <li>Issue and manage return of ad-hoc annual rating declarations</li> <li>Process rate refunds as required</li> <li>Provide labels on request for bulk mail outs</li> <li>Supply any statistics which may be required for analysis</li> <li>All verbal and written communication is professional and accurate</li> <li>All customer queries are researched thoroughly, and a timely response is provided</li> <li>Advising and supporting customers with Rates Rebate applications, including retirement village residents</li> <li>Reconcile the rate rebate system with the General Ledger</li> <li>Issue new resident rates newsletters promoting direct debit and opt in for email communication</li> </ul>
Penalties and Remissions	<ul style="list-style-type: none"> <li>Charge the annual arrears penalty and quarterly instalment penalty by the due date</li> <li>Reconcile penalties applied to the rating system to the Age Trial Balance</li> <li>Issue rates remission forms every two years and where the application meets the criteria to qualify for rate remission maintain the rating system</li> </ul>
Manage the direct debit banking system	<ul style="list-style-type: none"> <li>Load direct debits, and transfer the file for weekly, fortnightly, monthly and quarterly payments.</li> <li>Calculate fixed direct debit amounts</li> <li>Update fixed direct debit amounts annually and notify customers of adjusted amounts</li> <li>Inform ratepayers of dishonoured payments, and if the payment amount need increasing or decreasing</li> </ul>
Health & Safety and Wellbeing	<ul style="list-style-type: none"> <li>Model a culture of safety and wellbeing for your staff (if in a Supervisor/Manager position)</li> <li>Take responsibility for your own health and safety</li> </ul>

Responsibility	Key Functions/outcome
	<ul style="list-style-type: none"> <li>• Ensure your own actions keep self and others safe</li> <li>• Identify, report and assist to eliminate hazards/risks in work place</li> <li>• Participate in local work place safety management practices</li> <li>• Participate in workplace wellbeing initiatives</li> <li>• Ensure compliance under Health and Safety at Work Act 2015</li> </ul>
Project Management	<ul style="list-style-type: none"> <li>• Undertakes projects and/or other initiatives that may be assigned by the manager or SLG</li> </ul>
Emergency Management	<ul style="list-style-type: none"> <li>• Participates in civil defence emergency management (CDEM) events and training if required</li> </ul>

Note: This is a broad outline of the responsibilities for this position and not an exhaustive list of your responsibilities. Key responsibilities may vary from time to time as directed by your supervisor/manager to accommodate the operational needs of the team and organisation.

## FUNCTIONAL RELATIONSHIPS

Internal	External
<ul style="list-style-type: none"> <li>• Finance Team</li> <li>• IT Team</li> <li>• Land and Property Staff</li> <li>• Other Council Staff</li> <li>• Revenue Manager</li> <li>• Customer Service Team</li> <li>• Lims Officers</li> </ul>	<ul style="list-style-type: none"> <li>• Ratepayers and General Public</li> <li>• Local Government Agencies</li> <li>• Solicitors</li> <li>• Valuation Service Provider</li> <li>• Banking Institutions</li> <li>• Real Estate Agents</li> <li>• Water meter account holders</li> </ul>

## VISION

***“Making a better life for you and your families. We’re in this together – let’s make it work!”***

## VALUES

**Kia kōtāhi mai – We’re in this together**

**Unite**

**Connect**

**Deliver**

**Kōtahitanga**

Six key behaviours summarises how we will operate and support our values:

- Share and seek information with open, effective and intentional communication
- Support one another with honesty, respect and integrity in all interactions
- Exceed expectations of the community and beyond
- Seek improvement in all that we do

- Harmonise life and work
- Build a stronger relationship with the whenua and the people

## PERSON SPECIFICATION

### Education and Qualifications

Essential	Desirable
<ul style="list-style-type: none"> <li>• NZQA Level 2 or equivalent level of learning through experience</li> </ul>	<ul style="list-style-type: none"> <li>• Local Government (Rating) Act 2002</li> </ul>

### Personal Attributes

Essential	Desirable
<ul style="list-style-type: none"> <li>• Team player</li> <li>• Excellent communicator</li> <li>• Ability to multi task</li> <li>• Attention to detail</li> </ul>	<ul style="list-style-type: none"> <li>• Affiliation with Taupō</li> </ul>

### Competencies and Experience

Essential	Desirable
<ul style="list-style-type: none"> <li>• Excel spreadsheets</li> <li>• Articulate written communication</li> <li>• Word – mail merge</li> <li>• Financial reconciliations</li> <li>• Accounting principles</li> <li>• Customer Service</li> <li>• Computer and keyboard skills</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of Local Government (Rating) Act 2002</li> <li>• Knowledge of computer rating systems (Magiq Computer System)</li> <li>• Rating Experience</li> <li>• Communication and interpersonal skills</li> </ul>

## JOB DESCRIPTION SIGN-OFF

*Please note that this Job Description will be discussed annually to ensure currency of the position responsibilities.*

	Manager	Employee
Name		
Signature		
Date		