# Senior Rates Officer

| | |
|---|---|
| **Department** | Finance |
| **Location** | Seymour Street, Blenheim |
| **Direct reports** | Nil |
| **Reporting to** | Team Leader Rating |
| **Grade** | 11 |
| **Financial delegation** | No budget responsibility |

## Department Overview

This position is within the Finance Department. This department is responsible for providing Council's Finance and Treasury functions. This includes supporting Long Term and Annual Planning; accounts payable and receivable; budgeting; internal controls; rates administration; revaluation; taxation; financial modelling; reporting (financial and performance); risk and insurance; and MDC Holdings Ltd, Marlborough Waters Ltd, and Marlborough Airport Ltd financial management and reporting.

## Purpose of the Role

The purpose of this role is to charge, collect, maintain appropriate records for, and account for all rates and charges levied by Council in compliance with the appropriate Acts and Regulations and in accordance with Council policy.

Council uses Technology One software, particularly Financials, Enterprise Budgeting and Property and Rating. Microsoft Office is also widely used, including Excel based reporting from the core systems.

## Key Responsibilities

| | |
|---|---|
| **Rating legislation and policy** | Have an in depth understanding of the Local Government Act 2002 (as it pertains to rates), the Local Government Rating Act 2002, Council's Rating and Revenue and Financing Policies and Rating Funding Impact Statement. Ensure you have an understanding of Council Policies and the fundamental basis for their establishment and application. |
| **New/amendments to rates policy and rates/charges adopted in Annual Plan** | Assist with the development and implementation of any new policy and rates/charges adopted in the Annual Plan. |
| **Projects** | Assist Council staff with rating aspects of new schemes, including Capital Project Funding Plans. |

| | |
|---|---|
| **Changes to valuation/ rating records** | Ensure Valuation Notices, are maintained.<br><br>Subdivisions and new accounts etc will be processed to meet monthly reconciliation timeframes. Arrange for the creation of new Rate Accounts, links with Property Numbers and links with person numbers. Load rate quals and rate values, types, differential groups, remissions etc to ensure that all rating policies are correctly applied.<br><br>Ensure that the RID is maintained so that QV has a sound basis to perform the triennial revaluation to obtain a clear opinion from the Valuer General.<br><br>Ensure that audit report logs regarding RID maintenance, rate quals and water meters are investigated and appropriate remedial action taken on a timely basis.<br><br>Check for required amalgamations due to Section 75 and notify QV to action.<br><br>Monitor and maintain pool charges.<br><br>Monitor and maintain bin charges. |
| **Rates journals** | Process all Rate Journals as required.<br><br>Ensure that all amendments to rate quals rate vals, etc are prepared, processed and balanced as required.<br><br>Supplementary processes are carried out as required. |
| **Quotable Valuation valuations** | Ensure rateable valuations are reconciled with Quotable Valuation records on a monthly basis.<br><br>Keep up to date with information relating to the next revaluation as you will need to pass that knowledge onto ratepayers. |
| **Triennial revaluations** | Attend meetings and assist Team Leader Rating prepare triennial timetable and assist with completion of Marlborough District Council revaluation tasks. |
| **Penalties** | Ensure that Council's penalty policies are implemented by completing the penalty runs.<br><br>Assist with write offs as needed. |
| **Remissions** | Manage the remission process for all remissions as required according to Council policies, approval policy and delegated authority policy. |
| **Rating system** | Ensure that a working knowledge of the Property and Rating system is acquired to perform rates tasks and to enable back-up support for the Team Leader Rating. |
| **Water and sewerage connection applications** | Regularly liaise with the Water Services to ensure that they advise all new service connections and that appropriate charges are applied. |
| **Non user/user service charges (water/sewerage)** | Where rate assessments include a non-user charge for water and sewerage ensure that all non-user charges are deleted and user charges are added. On checking the post-line report or valuation assessment that indicates a building has been erected. Refuse/recycling charges also to be added as required. |

| | |
|---|---|
| **Energy efficiency rate maintenance** | Ensure that all rating requirements are maintained to ensure that all rating codes are correctly applied.<br><br>Ensure you liaise with other staff in Finance. |
| **Annual rate assessment and quarterly invoice processing** | Provide assistance as required for the annual rate levy process, rate assessments and quarterly rate invoicing processes. |
| **Rate arrears** | Charge instalment penalties, including follow up communications and debt monitoring.<br><br>Complete debt recovery processes including setting up payment plan arrangements and notices of default and notices of demands to banks. |
| **Rates payment arrangements** | Monitor and review ratepayers on payment arrangements on a regular basis to ensure compliance with the arrangement.<br><br>Where possible encourage moving from online or automatic payment to Direct Debit. |
| **Answer general rate enquiries** | Explain Council and legislative requirements to ratepayers including annual rates movements.<br><br>All correspondence enquiries (letter, email or telephone) and filing are processed daily (recognising that during periods of heavy work load, tasks will need to be prioritised).<br><br>Courtesy, efficiency and accuracy are essential when dealing with enquiries.<br><br>Deal with the general public in a courteous and positive manner and promote a high standard of public relations. |
| **Reports and information** | Ensure that reports and information on rating and associated matters be produced as and when required. |
| **Job procedures** | Ensure position job procedures are updated and maintained.<br><br>Regularly access rates procedures to ensure procedures are consistently applied. |
| **Other** | While this position description outlines the primary purpose and key responsibilities of the role at the time it was developed or reviewed, it is intended as a guide and does not represent an exhaustive or prescriptive list of duties.<br><br>As Marlborough District Council's priorities, business needs and ways of working evolve, the responsibilities of the role may change and may not always be fully reflected in this document. |

# Organisational Responsibilities

## Continuous improvement

Challenge the status quo and continuously seek opportunities to improve services and processes.

## Customer service

Relate with the public in a courteous and positive manner. Actively listen to understand and meet customer's needs.

## Digital mindset

Have a "digital mindset" which allows you to approach situations with a digital focus, taking full advantage of the technology, information, and data available to us whilst ensuring operational outcomes, efficiency, and security aren't compromised.

Be aware that transformation comes not from a change of system or infrastructure but a change in mindset. Opening your mind to the idea of doing things differently can unlock the true range of possibilities.

## Health, safety and wellbeing

Take ownership and responsibility for your own decisions and actions by proactively engaging in safe work practices that prevent injury; and look out for your colleagues, contractors, customers, and visitors.

Report hazards, injuries, illnesses, near-misses, unsafe practices, rules that don't work and other opportunities for improvement without fear or delay, so that we can all learn and share in the learning.

Co-operate with reasonable instructions and procedures.

Contribute to Council's ongoing safety improvement journey.

Make safety a priority and help lead the way!

## Inclusion and diversity

Support an inclusive workplace - an environment where our employees feel safe, valued and respected; and have opportunities to contribute their perspectives, experience and talents to our organisation.

Support a diverse workforce (the visible and invisible factors that define us as individuals) by displaying an open-minded, non-judgmental attitude towards others.

## Record management

Create and maintain all records of Council business (regardless of format) in approved corporate information systems, as per Council's information and data management policies and procedures.

## Response in emergencies

Be available to assist during emergencies as and when they occur, working within your level of competence and training.

## Risk management

Understand, report and manage operational and compliance risk. Familiarise yourself, comply with and give advice in accordance with Council's risk management policies and procedures.

## Te ao Māori

Willingness to develop cultural competency; for example by developing an understanding of te reo Māori, tikanga Māori (Māori customs and practices), mātauranga Māori (Māori wisdom, knowledge and understanding) and Te Tiriti of Waitangi; and by engaging with Māori communities as required within your role.

## Other duties

Take on any additional duties or special projects that may be assigned from time to time and ensure that these are performed effectively and efficiently.

# Person Specification

| | |
|---|---|
| **Qualifications** | NCEA Level 3<br>National Diploma in Business or similar |
| **Experience and knowledge** | 5-10 years' experience in rating, accounting, or a related field preferably in Local Government.<br>An understanding of the complex activities of Local Government rating and a sound knowledge of the rating powers provided by legislation with the ability to explain clearly in a way customers can easily understand.<br>Experience in credit management, including ideally experience in the additional recovery options available for rates.<br>Effective credit control skills – including dealing with non-paying debtors in an assertive, but courteous manner with empathy where required.<br>A proven clerical background.<br>A sound understanding of computer systems.<br>An ability to process data accurately.<br>An ability to collaboratively work as part of the wider Council team with an emphasis on achieving organisational as compared to individual objectives.<br>Experience in policy and procedure development. |

# Core Competencies

| | |
|---|---|
| **Adaptability** | Ability to maintain a calm, professional manner in challenging situations.<br>Ability to operate effectively in a complex and changing environment. |
| **Commitment to improvement** | Enthusiasm for continually increasing knowledge and technical abilities.<br>Enthusiasm for continuous improvement and efficiency in processes. |
| **Communication** | Excellent oral and written communication skills which are appropriate and relevant to the audience. |
| **Customer focus** | Excellent customer services skills.<br>Ability to understand customers' needs via active listening. |
| **Digital literacy** | Ability to learn new technological skills essential for digital transformation and to think innovatively and embrace a perpetual learning culture.<br>Motivation to use digital skills to create new opportunities. |
| **Integrity** | Ability to handle confidential or controversial information with discretion and professionalism.<br>Takes accountability for own actions. |

| | |
|---|---|
| **Interpersonal skills** | Proven ability to work effectively in a team environment.<br>Proven ability to develop relationships and work collaboratively with others. |
| **Organisational skills** | Strong personal prioritisation and time management skills.<br>Ability to multi-task, prioritise, pay attention to detail and use initiative. |
| **Problem solving and decision making** | Considers risk factors in decision-making.<br>Uses own judgement and experience to solve problems. |

# Strategic Framework

| | |
|---|---|
| **Vision** | Marlborough is a globally connected district of smart, progressive, high-value enterprises, known for our economic efficiency, quality lifestyle and wellbeing, caring community, desirable location and healthy natural environment. |
| **Mission** | We invest in Marlborough's future, our people, quality lifestyle and outstanding natural environment. |
| **Values** | Council's values and behaviours are based on Respect, Professionalism and Integrity. Council is committed to an environment that supports professional development, an equal opportunities workplace and a positive culture.<br>All staff are expected to endorse and support Council's Vision and Values and actively work to achieve them, behaving with the highest level of professionalism and integrity and exhibiting courtesy and impartiality towards colleagues and the community.<br>Our values are:<br>• We are open, transparent and collaborative.<br>• We partner with tangata whenua iwi.<br>• We involve and respect our many cultures.<br>• We are innovative and strive for excellence.<br>• We are adaptive and responsive to community needs.<br>• We work in an environmentally sustainable manner. |