

JOB DESCRIPTION

Officer Revenue Management

ROLE TITLE	Officer Revenue Management
SECTION/DIVISION:	Financial Control, Financial Services Division
REPORTS TO:	Manager Revenue Management (for student finance tasks) or Lead Officer Revenue Management (for accounts receivable and cashiers' tasks)
DIRECT REPORTS (FTE):	Nil
INDIRECT REPORTS (FTE):	Nil
PRIMARY PURPOSE OF THE ROLE:	<p>Undertake a range of accounts receivable and financial transaction activities in an accurate, efficient and timely manner, observing compliance with all internal controls and providing excellent service to internal and external customers.</p> <p>The role is part of the Financial Services Division, flexibly providing finance related services, across the University. Actively managing and contributing to a high-performance team environment, providing excellent service and identifying finance and business improvement practices.</p>
ACCOUNTABILITIES:	<p>Service delivery</p> <p><i>Outcome: Transactions are efficiently and accurately processed, within deadlines and comply with policies, procedures and regulations.</i></p> <ul style="list-style-type: none"> • Undertake a range of routine financial transaction activities accurately and efficiently in accordance with performance standards. Ensure all activities comply with the University's policies, controls and delegations. Check and ensure that mandatory data and financial approvals are present, and the appropriate tax treatments in accordance with prescribed IRD regulations are followed. • Undertake accounts receivable activities such as: <ul style="list-style-type: none"> ○ Receive and receipt all funds received including student fees, debtor payments, alumni donations and sundry deposits. ○ Prepare daily banking; process sundry transactions on bank statements; resolve simple receipting issues; process requests for cash; respond to simple ecommerce queries. ○ Input foreign exchange rates into finance software; ○ Enter a range of payments into banking software for approval. ○ Check and post created invoices and credit notes for correct coding and GST treatment. ○ Student fees - in accordance with prescribed regulations, process simple fee adjustments, apply late fees, calculate and process refunds, apply rebates. ○ Follow up on routine collections and overdue accounts. <p>Reporting and ledger maintenance</p> <p><i>Outcome: Data is collected and analysed; reports prepared are accurate and completed within deadlines.</i></p> <ul style="list-style-type: none"> • Collate and interpret basic financial data, present verified financial information, and prepare and interrogate standard financial reports.

Policies, controls and compliance

Outcome: Activities are managed in line with delegations, policy, procedure and legislation.

- Perform all activities in accordance with necessary financial controls. Proactively note any systems or process control weaknesses, or policy and procedures for non-compliance and escalate to ensure they are addressed.
- Understand legislative obligations and privacy requirements for work undertaken.

Manage self, contribute to team and organisational culture

Outcome: Workloads are managed, team members work together to achieve shared goals and priorities.

- Organise own workload across a range of tasks in a high-volume work environment within deadlines, and adjust to frequent changes to day-to-day workload and priorities.

Customer support and training

Outcome: Client experience and relationships are prioritised by responding to queries professionally and in a timely manner, while also enhancing University staff's financial proficiency in accounts receivable tasks through effective interactions.

- In conjunction with the supervisor, work collaboratively with AskOtago and the broader Financial Services Division, to deliver an integrated and seamless suite of services that provide excellence in the customer experience.
- Provide first line finance services and subject matter information and guidance about routine financial system and financial transaction enquiries, including those referred via AskOtago, utilising strong client service skills, high energy and motivation. Respond and attend to enquiries in a professional and timely manner, providing accurate information, and referring more complex matters as appropriate.
- Interact with University staff to increase their financial proficiency in accounts receivable tasks.

Continuous improvement and problem solving

Outcome: opportunities for improvement are identified and escalated

- Actively contribute to identifying opportunities to improve process and customer experience and contribute to the development and ongoing review of finance policies, procedures and initiatives.

Health, safety, wellbeing and emergency preparedness

Outcome: Maintain a safe work environment

- Perform Departmental Health & Safety Officer (DHSO), first aid and/or fire warden duties (if required); and ensure reasonably practicable steps are taken to create a safe and healthy work environment

KEY RELATIONSHIPS:

Internal

Students
Managers and staff,
Financial Services Division staff
Ask Otago
Divisional Services and Administration staff
Student Experience staff

External

Customers

QUALIFICATIONS AND EXPERIENCE:

Essential

Recognised qualification appropriate to the role or proven experience in a role where high levels of accuracy and customer service delivery are essential.
Experience working to tight deadlines and of solving customer queries.

Preferred

Proven experience' working in an environment with high volume or a wide variety of finance transactions.

TECHNICAL SKILLS AND KNOWLEDGE:

Essential

Medium degree of computer literacy with proficiency in the Microsoft suite of programmes, and intermediate Excel; well-developed keyboard and word processing skills.

Numerical and data analysis skills.

A good knowledge of Technology One Financials would be an advantage.

Basic knowledge of good accounting principles, processes and understanding of fraud awareness.

Knowledge of tax legislation including GST as it applies to tasks completed.

SPECIAL REQUIREMENTS:

Contribute as part of a network of Financial Services staff, to provide suitable coverage during periods of leave and peak period activities.

At the University, we are required to be compliant with the Public Records Act 2005 and Privacy Act 2020. Staff are expected to participate in available training to understand these requirements and effectively manage information accordingly.

DIRECT BUDGET ACCOUNTABILITY:

Nil

MĀORI STRATEGIC FRAMEWORK:

Act in a manner consistent with the principles and implications, as well as the University's commitment to the Treaty as articulated in the Māori Strategic Framework.

PACIFIC STRATEGIC FRAMEWORK:

Act in a manner consistent with the strategies and goals contained in the University's Pacific Strategic Framework, role-modelling and promoting Pacific values, equity and diversity principles and cultural safety practices.

HEALTH AND SAFETY:

Act and work in a manner compliant with current health and safety at work legislation and University procedures, frameworks, and guidelines. Role model safe behaviour and practices, share the responsibility to prevent harm and contribute to a safe campus and work environment, including raising workplace health and safety concerns for self, students, visitors, and other staff.

SUSTAINABILITY:

Act in a manner consistent with the University's sustainability commitments; role-modelling sustainable practices, with a particular emphasis on minimising the environmental impact of day-to-day activities.

CAPABILITY FRAMEWORK:

Capability Group	Capability Name	Level
ENGAGE	Communicate Effectively	Foundational
	Commit to Customer Service	Foundational
	Work Collaboratively	Foundational
	Influence and Negotiate	Foundational
ENABLE	Deliver Results	Foundational
	Plan and Prioritise	Foundational
	Think and Solve Problems	Foundational
	Demonstrate Accountability	Foundational
PERSONAL ATTRIBUTES	Display Resilience and Courage	Foundational
	Act with Integrity	Foundational
	Manage Self	Foundational
	Value Diversity	Foundational
LANGUAGE AND CULTURE	Te Reo	Foundational
	Tikanga Māori	Foundational

CAPABILITY FRAMEWORK DESCRIPTORS

Officer Revenue Management

ENGAGE

Communicate Effectively	Commit to Customer Service	Work Collaboratively	Influence and Negotiate
<i>Communicate clearly, actively listen to others, and respond with respect</i>	<i>Provide customer centric services in-line with the University's and organisational objectives</i>	<i>Collaborate with others and value their contribution</i>	<i>Gain consensus and commitment from others and resolve issues and conflicts</i>
FOUNDATIONAL	FOUNDATIONAL	FOUNDATIONAL	FOUNDATIONAL
<p>Speak at the appropriate pace and volume for varied audiences</p> <p>Explain things clearly</p> <p>Display active listening and allow others time to speak</p> <p>Write in a way that is logical and easy to follow</p>	<p>Understand the importance of quality customer service</p> <p>Proactively help customers understand the services that are available</p> <p>Take responsibility for delivering timely services which meet customer requirements</p> <p>Keep customers informed of progress in a timely manner and seek feedback to ensure their needs are met</p> <p>Show respect, courtesy and fairness when interacting with customers</p>	<p>Work as a supportive and co-operative team member, share information and acknowledge others' efforts</p> <p>Respond positively to others who need clarification or guidance on work activities</p> <p>Step in to help others when workloads are high</p> <p>Keep team and supervisor informed of work tasks</p>	<p>Utilise facts to support claims</p> <p>Help to find solutions that contribute to positive outcomes</p> <p>Respond to conflict without worsening the situation and refer to a supervisor where appropriate</p> <p>Know when to withdraw from a conflict situation</p>

ENABLE

Deliver Results	Plan and Prioritise	Think and Solve Problems	Demonstrate Accountability
<i>Achieve results through efficient use of resources and a commitment to quality outcomes</i>	<i>Plan to achieve priority outcomes and respond flexibly to changing circumstances</i>	<i>Think, analyse and consider the broader context to develop practical solutions</i>	<i>Be responsible for own actions, adhere to legislation and policy and proactively address risk</i>
FOUNDATIONAL	FOUNDATIONAL	FOUNDATIONAL	FOUNDATIONAL
<p>Complete own work tasks under guidance, within set budgets, timeframes and standards</p> <p>Take the initiative to progress own work</p> <p>Identify resources needed to complete allocated work tasks</p> <p>Seek clarification when unsure of work tasks</p>	<p>Plan and coordinate allocated activities</p> <p>Re-prioritise own work activities on a regular basis to achieve set goals</p> <p>Contribute to the development of team work plans and goal setting</p> <p>Understand team objectives and how own work relates to achieving these</p>	<p>Find and check information needed to complete own work tasks</p> <p>Identify and inform supervisor of issues that may impact on completion of tasks. Escalate more complex issues and problems when these are identified</p> <p>Share ideas about ways to improve work tasks and solve problems</p> <p>Suggest improvements to work tasks for the team</p>	<p>Take responsibility for own actions</p> <p>Be aware of delegations and act within authority levels</p> <p>Be aware of team goals and their impact on own work tasks</p> <p>Escalate issues when these are identified</p>

PERSONAL ATTRIBUTES

Display Resilience and Courage	Act with Integrity	Manage Self	Value Diversity
<i>Be open and honest, prepared to express your views, and willing to accept and commit to change</i>	<i>Be ethical and professional and act in keeping with the University's values</i>	<i>Show drive and motivation, a measured approach, and a commitment to learning</i>	<i>Show respect for diverse backgrounds, experience, and perspectives</i>
FOUNDATIONAL	FOUNDATIONAL	FOUNDATIONAL	FOUNDATIONAL
<p>Be open to new ideas and approaches</p> <p>Offer own opinion, ask questions and make suggestions in an appropriate manner</p> <p>Be willing to adapt to new situations</p> <p>Do not give up easily when problems arise</p> <p>Stay calm in challenging situations</p>	<p>Behave in an honest, ethical and professional way</p> <p>Take opportunities to clarify understanding of ethical behaviour requirements and follow legislation, rules, policies, guidelines and codes of conduct that apply to own role</p> <p>Speak out against misconduct and inappropriate behaviour</p>	<p>Be willing to develop and apply new skills</p> <p>Show commitment to completing work activities effectively</p> <p>Look for opportunities to learn and improve own performance seek feedback from colleagues and stakeholders</p> <p>Demonstrate a motivated attitude to work activities</p>	<p>Acknowledge and be responsive to diverse experiences, perspectives, values and beliefs</p> <p>Be open to the inputs of others</p> <p>Work to understand the perspectives of others</p>

LANGUAGE AND CULTURE

Te Reo	Tikanga Māori
<i>Develop understanding and use of te reo Māori (Māori language)</i>	<i>Create knowledge and use of tikanga Māori (Māori cultural practices) in the workplace</i>
FOUNDATIONAL	FOUNDATIONAL
<p>Use te reo Māori words and greetings in an appropriate way in the work place</p> <p>Endeavour to use and pronounce Māori words correctly</p> <p>Actively participate in training and development opportunities that increase own te reo Māori language capability</p> <p>Demonstrate a competent level of pronunciation respecting the dialect of mana whenua</p> <p>Actively promote use of te reo Māori in the work place and engage with work groups and individuals to build interest and increased language capability of others</p>	<p>Understand the University's Māori Strategic Framework and its relevance for own work</p> <p>Demonstrate some awareness of Māori customs, values and beliefs</p> <p>Has some knowledge of Te Tiriti o Waitangi</p> <p>Actively participate in training and development opportunities that increase own understanding of tikanga Māori and knowledge of Te Tiriti o Waitangi</p>