

## JOB DESCRIPTION

# Team Leader Revenue Management

<b>ROLE TITLE</b>	Team Leader Revenue Management
<b>SECTION/DIVISION:</b>	Shared Services Division, Finance Services
<b>REPORTS TO:</b>	Senior Manager Finance Services
<b>DIRECT REPORTS (FTE):</b>	Up to 10
<b>INDIRECT REPORTS (FTE):</b>	Nil
<b>PRIMARY PURPOSE OF THE ROLE:</b>	<p>Manage, control and coordinate the charging and collection of University revenue and a range of accounts receivable activities. Build positive relationships with internal and external domestic and international stakeholders for the charging and collection of domestic and international students' fees. Ensure service delivery is responsive and provides exemplary customer experience and advice.</p> <p>The role is part of the Shared Services team, flexibly providing finance transaction processing services across the University.</p>
<b>ACCOUNTABILITIES:</b>	<p>Manage a team in a high volume Shared Service unit to achieve operational outcomes. Manage the day-to-day work activities of the team, including timelines, expected customer experience and prioritising and allocating workflow. Implement and monitor the appropriate separation of duties amongst the accounts receivables team.</p> <p>Provide timely and accurate advice, information and expert technical interpretation on complex transactional issues and matters, in a manner easily interpreted by stakeholders, to ensure resolution in an equitable and appropriate manner. Evaluate and respond to sensitive and contentious operational or service delivery issues to ensure that financial, reputational and business risks are minimised.</p> <p>Place the customer at the centre of all decision making, and effectively respond to challenging and demanding customers who have limited knowledge of financial policies and procedures.</p> <p>Ensure that debtors' invoices and credit notes are processed correctly and in a timely fashion, in accordance with University policy and statutory requirements. Resolve complex cash receipting and accounts receivable issues. Manage the charging and collection of domestic student fees. Ensure appropriate procedures are in place and adhered to; and receivables accounts reflect correct amounts with appropriate authority held for adjustments made (e.g. student assistance grants, scholarships, exemptions, credits, etc.). Ensure fee refunds are managed effectively. Manage the charging and collection of international student fees. Ensure correct fees are charged for both on campus and distance. Oversee the disbursement of the University International Student Loans Scheme, and ensure third parties are invoiced appropriately. Develop and maintain excellent working relationships with international Governmental agencies responsible for sponsored students. Work collaboratively with the International Office regarding individual international student fees.</p> <p>Maintain oversight of outstanding student fee and general debtor balances and payment plans. Ensure all receivables accounts are maintained within payment terms, and investigate overdue balances. Review overdue debtors and ensure appropriate action is taken to collect outstanding debts, approve payment plans for debtors within policy guidelines.</p>

Monitor the collection of accounts receivable and referrals to collection agencies, in accordance with Finance Services Division policy and procedures. Liaise and follow up to resolve outstanding amounts, monitor agency reports, and ensure monthly agencies accounts are processed correctly.

Manage ecommerce transactions.

Manage and prepare reconciliations, monitor and control the accuracy and integrity of the Debtors Subsidiary ledgers. Maintain oversight of invoice issuing processes, analyse reports of balances to be written off. Maintain oversight of ledger maintenance ensuring data integrity is maintained and balances to the general ledger. Maintain the chart of accounts, coordinate and create month end close off of transactions and rolling of ledger, create and run month end allocation journals.

Extract and analyse data to provide relevant and accurate finance transaction reports for management such as aged analysis, supplier type analysis, days taken to approve transactions, debt levels, and receipts by transaction type, master file maintenance stats. Respond to ad-hoc requests for non-system generated reports.

Manage and support the validity of Finance Services accounts receivables reference materials, and knowledgebase information. Write and proof read enrolment, course approval and fees related materials. Update and ensure the currency of fees manual. Work closely with AskOtago, and provide advice, guidance and ad hoc training on student fees related matters.

Contribute to the creation of policies and guidelines that underpin the accounts receivables business activity.

Seek new opportunities for enhancing the accounts receivables services. Collaborate with colleagues and other stakeholders (such as Shared Services and Financial Services Division teams), to maximise efficiency, leverage resourcing and collective knowledge, and to deliver a consistent, integrated suite of finance services.

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.

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#### **KEY RELATIONSHIPS:**

##### Internal

Managers, staff, students  
Financial Services Division staff  
International Office  
Shared Services staff e.g. Ask Otago, Client Services Coordinators,  
Administrators - Student Experience

##### External

DHBS, research funding bodies, research groups  
Consultants, customers  
Domestic Government departments, institutions, agencies such as WINZ  
International Government departments and agencies  
Debt collection agencies  
Other tertiary institutions regarding third party sponsorship/invoicing

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#### **QUALIFICATIONS & EXPERIENCE:**

##### Essential

Recognised qualification in accounts administration, accounting, finance or related field.  
10+ years' of related experience where high levels of customer service delivery are expected.  
Experience leading a receivables team.  
Proven experience in debtor management.  
Proven experience in appropriate finance systems for the purposes of processing financial transactions and reporting  
Proven experience in applying good accounting principles and standards.

Preferred

Tertiary qualification.

Experience of working in an environment with high volume or a wide variety of finance transactions.

Experience in using Finance One.

At least 3+ years' experience in managing the delivery of high quality work outputs and team performance.

Experience in dealing with a broad spectrum of customers and stakeholders in an appropriate manner in respect of debt management.

Tertiary sector experience.

Experience of dealing with student loan matters.

**TECHNICAL SKILLS AND KNOWLEDGE:**

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

High level of numerical and data analysis skills.

A good knowledge of Finance One would be an advantage.

A good understanding of accounting principles, processes and fraud awareness.

Knowledge of internal control systems and procedures

An understanding of tax legislation as it applies to tasks completed.

A good understanding of student loan regulations.

**SPECIAL REQUIREMENTS:**

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

**DIRECT BUDGET ACCOUNTABILITY:**

Authorises minor expenditure from another person's budget in accordance with University financial delegations.

**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
<b>ENGAGE</b>	Communicate Effectively	Adept
	Commit to Customer Service	Adept
	Work Collaboratively	Intermediate
	Influence and Negotiate	Adept
<b>ENABLE</b>	Deliver Results	Adept
	Plan and Prioritise	Intermediate
	Think and Solve Problems	Adept
	Demonstrate Accountability	Adept
<b>PERSONAL ATTRIBUTES</b>	Display Resilience and Courage	Adept
	Act with Integrity	Adept
	Manage Self	Intermediate
	Value Diversity	Intermediate
<b>PEOPLE MANAGEMENT</b>	Manage and Develop Capability	Intermediate
	Inspire Direction and Purpose	Foundational
	Optimise Work Outcomes	Intermediate
	Change and Innovation	Foundational
<b>LANGUAGE AND CULTURE</b>	Te Reo	Foundational
	Tikanga Māori	Intermediate

## CAPABILITY FRAMEWORK DESCRIPTORS

### Team Leader 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>
ADEPT	ADEPT	INTERMEDIATE	ADEPT
<p>Tailor communication to the audience</p> <p>Clearly explain complex concepts and arguments to individuals and groups</p> <p>Actively listen to others and clarify own understanding. Create opportunities for others to be heard</p> <p>Write fluently in a range of styles and formats. Prepare written material that is well structured and easy to follow by the intended audience</p>	<p>Take responsibility for delivering high quality customer-focused services</p> <p>Understand customer perspectives and ensure responsiveness to their needs</p> <p>Identify customer service needs and implement solutions</p> <p>Find opportunities to connect and co-operate with internal and external parties to improve outcomes for customers</p> <p>Maintain good relationships with key customers in area of expertise</p>	<p>Build a supportive and co-operative team environment</p> <p>Share information and learning across teams. Support others in challenging work situations</p> <p>Acknowledge outcomes which were achieved by effective collaboration</p> <p>Engage other teams or work units to share information and solve issues and problems jointly</p>	<p>Negotiate from an informed and credible position</p> <p>Lead and facilitate productive discussions with staff and stakeholders</p> <p>Encourage others to talk, share and debate ideas to achieve a consensus</p> <p>Pre-empt and minimise conflict. Recognise and explain the need for compromise</p> <p>Influence others with a fair and considered approach and sound arguments</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>
ADEPT	INTERMEDIATE	ADEPT	ADEPT
<p>Take responsibility for delivering on intended outcomes. Use own expertise and seek others' expertise to achieve work outcomes</p> <p>Ensure team/work unit staff understand expected goals and acknowledge success</p> <p>Identify resource needs and ensure goals are achieved within budget and deadlines</p> <p>Identify changed priorities and ensure allocation of resources meets new organisational needs. Ensure financial implications of changed priorities are explicit and budgeted</p>	<p>Understand the team/work unit objectives and align operational activities accordingly</p> <p>Initiate and develop goals and team plans and use feedback to inform future planning</p> <p>Respond proactively and with initiative to changing circumstances and adjust plans and schedules when necessary</p> <p>Ensure current work plans and activities are consistent with organisational change initiatives</p>	<p>Research and analyse information, identify interrelationships and make relevant evidence based recommendations</p> <p>Anticipate, identify and address issues and potential problems and select the most effective solutions from a range of options</p> <p>Participate in and contribute to team/work unit initiatives to resolve common issues or barriers to effectiveness</p> <p>Identify and share organisational process improvements to enhance effectiveness</p>	<p>Ensure that actions of self and others are focused on achieving organisational outcomes</p> <p>Assess work outcomes and identify and share learnings to inform future actions. Exercise delegations responsibly</p> <p>Identify risks to successful achievement of goals, and take appropriate steps to mitigate those risks</p> <p>Understand and exercise integrity and due diligence with budgets, University monies and other resources</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>
ADEPT	ADEPT	INTERMEDIATE	INTERMEDIATE
<p>Be flexible, show initiative and respond quickly when situations change</p> <p>Give constructive and honest feedback and advice using appropriate manner and tone</p> <p>Listen when ideas are challenged, seek to understand the nature of the challenge and respond constructively</p> <p>Raise and work through challenging issues and seek alternatives</p> <p>Keep control of own emotions and stay calm under pressure and in challenging situations</p>	<p>Represent the organisation in an honest, ethical and professional way and support a culture of integrity and professionalism within the team/work unit</p> <p>Set an example for others to follow and identify and explain ethical issues pertaining to work activity. Ensure others clearly understand the legislation and policy framework within which they operate</p> <p>Act to prevent and report misconduct and inappropriate behaviour</p>	<p>Be willing to develop and apply new skills and adapt existing skills to new situations</p> <p>Show commitment to achieving work goals effectively</p> <p>Show awareness of own strengths and areas for growth and seek and respond positively to constructive feedback and guidance</p> <p>Demonstrate a motivated attitude to work activities and maintain own motivation when tasks become difficult</p>	<p>Be responsive to diverse experiences, perspectives, values and beliefs and listen to others' individual viewpoints</p> <p>Seek input from others who may have different perspectives and needs</p> <p>Adapt and respond positively in diverse environments</p>

 **PEOPLE MANAGEMENT**

Manage and Develop Capability	Inspire Direction and Purpose	Optimise Work Outcomes	Change and Innovation
<i>Engage and motivate staff and develop capability and potential in others</i>	<i>Communicate goals, priorities and vision and recognise achievements</i>	<i>Manage resources effectively and apply sound workforce planning principles</i>	<i>Support, promote and champion change, and assist others to engage with change</i>
INTERMEDIATE	FOUNDATIONAL	INTERMEDIATE	FOUNDATIONAL
<p>Ensure that roles and responsibilities are clearly communicated</p> <p>Develop team capability and recognise and develop potential in people</p> <p>Be constructive and build on strengths when giving feedback</p> <p>Identify and act on opportunities to provide coaching and mentoring</p> <p>Recognise performance issues that need to be addressed and work towards resolution of issues</p>	<p>Assist team to understand organisational direction</p> <p>Ensure team members understand the work unit's strategy, policies and services and how their activities align to objectives and affect overall performance</p> <p>Understand and clearly communicate performance standards</p> <p>Recognise and acknowledge team members' high quality work</p>	<p>Develop team/work unit plans that take into account team capability and strengths</p> <p>Plan and monitor resource allocation effectively to achieve team/work unit objectives</p> <p>Ensure team members work with a good understanding of work principles as they apply to the work area</p> <p>Participate in wider work unit workforce planning to ensure the availability of capable resources</p>	<p>Support change initiatives and assist staff to understand their purpose and impact</p> <p>Share information with team members to assist them to understand and manage uncertainty and change</p> <p>Recognise barriers to change and support the team to accept and facilitate change</p>



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 work place</i>
FOUNDATIONAL	INTERMEDIATE
<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>Understand the University's Māori Strategic Framework and incorporate its principles appropriately in work place activities</p> <p>Demonstrate an appropriate workplace understanding and awareness of tikanga Māori</p> <p>Has knowledge of the Articles and Principles of Te Tiriti o Waitangi</p> <p>Take part in opportunities to extend own understanding and awareness of tikanga Māori and Te Tiriti o Waitangi</p>