

Job and Person Specification

Title of Role: Team Leader

Remuneration Level: ASO6

Business Unit: Public Trustee

Type of Appointment: Ongoing

Division: Customer Services

Position Number:

Job and Person Specification Approval

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DELEGATE

Primary Purpose

The Estate Services and Personal Estates Branches contribute to strategic business operations and provide high quality financial administration, estate and trust management, investment and legal services to customers of the Public Trustee.

The Team Leader is accountable to the Manager Estates Services or the Manager Personal Estates for:

- Participation in the leadership group within the Customer Services Branch and across the Public Trustee;
- Leading, planning and co-ordinating the day-to-day activities of a team to ensure the timely and efficient delivery of customer service;
- Provide high quality technical advice;
- Driving and implementing change management processes;
- Coaching, mentoring and developing team members;
- Assisting in the timely resolution of customer and stakeholder queries and complaints;
- Participating in compliance and audit programs; and
- Exercising significant delegations from the Public Trustee.

The Team Leader will contribute to the Customer Services Division's strategic business direction through reviews of legislation, policy, plans and work practices

Reporting Relationships

- A Customer Services Branch Manager
- Directly manages up to 20 staff (ASO2 to ASO5)

Key Relationships/Interactions

- Executive
- Senior management
- Other PT Branches
- Customers and community groups
- Key stakeholders

Key Challenges



- The day-to-day leadership of a team including resourcing, performance management and oversight of the delivery of quality and timely customer services
- Contributing to business sustainability including identifying process improvement opportunities and leading change management processes
- Managing appropriate controls to mitigate or minimise risk to ensuring quality standards are measured effectively and achieved
- Providing effective people leadership to staff embedding and fostering a culture of excellence

Special Conditions

- Some out of hours work and occasional intrastate and/or interstate travel may be required.
- May be required to undertake alternative duties within Public Trustee at the same classification level to meet operational needs.
- Employees will provide the highest standards of customer service to customers at all levels by modelling service excellence that meets the needs of customers and enhances the corporate profile of the organisation.
- Employees are expected to maintain the integrity and security of all information for which they are responsible as a result of employment in the Attorney-General's Department.
- An individual recommended for appointment/employment to a position of trust in Public Trustee will be subject to a satisfactory criminal history and background screening check being conducted in accordance with Employment Screening (Criminal History and Background Screening Check) Policy. Disclosure of any pending charges is also mandatory. Previous criminal conviction or pending charges will not necessarily preclude employment.

AGD Conditions

- Participation in regular performance review and development;
- Actively participate in all mandatory training requirements;
- Abide by the standards in the Code of Ethics for the South Australian Public Sector (the Code), relevant legislation and AGD policies and procedures; and
- Employment is dependent upon a National Police Certificate clearance that the AGD finds satisfactory.
- Actively manage and meet the requirements of managing occupational health and safety in the workplace

Flexible Working Arrangement Options

The South Australian public sector promotes diversity and flexible ways of working including part-time. You are encouraged to discuss the flexible working arrangements for this role.



Responsibilities

This Job and Person Specification provides an indication of the type of duties you will be engaged to perform. You may be lawfully directed to perform any duties that a person with your qualifications, skills and abilities would reasonably be expected to perform. The Team Leader is responsible for:

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
<p>Team Leadership</p>	<ul style="list-style-type: none"> • Assist with the development, management, leadership and strategic directions of the Customer Services Branch • Leading, planning and co-ordinating the day-to-day activities of a team to ensure the efficient and effective administration of estates in a timely manner. • Contributing to all business decisions, plans, policy development and actively participate in strategic leadership • Develop and mentor staff in accordance with development plan. • Prioritises tasks and schedules activities to avoid conflicting deadlines • Ensuring the implementation and evaluation of strategic business plans and policies. • Drive a continuous improvement ethos with the teams and ensure business practices are modern, efficient and customer focused. • Utilise operational reporting dashboards to develop a performance orientated culture. • Managing or participating in complex projects within the branch, division or organisation. • Identifying, developing and implementing new business products and procedures through consultation with external stakeholders, industry professionals and the community. • Managing and mitigating risks associated with Customer Service delivery. • Contributing and proposing changes to legislation amendments and reforms. • Providing a high-level technical advice to management and staff. • Contributing to (or initiating) operational reviews. • Identifying issues and emerging trends and prepare reports and solutions. • Contributing to the deployment of resources across the branch and division. • Plans for performance monitoring and feedback and determines action for performance improvement. • Actively managing and meeting the requirements of Work Health and Safety in the workplace. 	<ul style="list-style-type: none"> • Resource allocation effective and facilitates the achievement of business performance metrics • Individual staff members understand and strive to reach individual performance targets. • Staff members participate in professional development. • Every staff member has an up-to-date performance plan and annual performance review. • Staff performance issues are effectively addressed • Identifies key issues and opportunities that impact on performance and takes appropriate action to rectify • Remove barriers and overcomes obstacles and makes repeated attempts to meet objectives despite barriers. • Uses appropriate interpersonal styles and methods to inspire and guide individuals toward goal achievement; modifying behaviour to accommodate tasks, situations, and individuals involved. • Review High Risk files on an to manage business risks



<p>Administration and financial management of estates, wills and trusts</p>	<ul style="list-style-type: none"> • Ensure a high performing work team that undertakes the effective administration and financial management of estates, wills and trusts, including the timely investigation of the financial position of an estate. • Managing, leading, developing and monitoring a team and its workload. • Allocating of estates for administration in accordance with policy and procedure. • Monitoring the timely resolution of time sensitive customer activities particularly in relation to changes in personal circumstances which may affect the assets, income, health, safety, security or wellbeing of a customer. • Monitoring and undertaking risk assessment and evaluation and overseeing prudent financial management and the investment of estates funds. • Exercising authority when making decisions within appropriate delegations. • Ensure all work practices, methods and instructions are properly documented and continuously review and updated • Maintain a current understanding of legislation and relevant accounting practices and monitor compliance within teams • Contributing to the management of resources including strategies that produce a culturally diverse workforce. 	<ul style="list-style-type: none"> • Effective risk management leads to a reduction in risk profiles • Controls are operating correctly and changes are recommended as necessary • Risks are managed • Manage team workloads • Performance is effectively measured, and customer satisfaction is improved • Work practices and instructions are up to date and accurately describe processes • Adheres to the Acts, Regulations, Policies, Procedures and delegations, • Financial information is determined and available for decision making within agreed timeframes including following a change in a customer's personal or financial circumstances • Next of kin and family structures are identified within agreed timeframes • Customers changing needs are actioned within agreed timeframes. • Where our authority is limited in scope, ensuring that a customer's financial situation is sufficiently understood to enable control of assets and consent decisions can be implemented immediately upon sufficient powers being conferred
<p>Customer Service</p>	<ul style="list-style-type: none"> • Ensure the Branch provides a high-quality Customer Service that is responsive to the needs and demands of customers and stakeholders including those from cultural and diverse backgrounds. • Managing the resolution of complex complaints through investigation, research, consultation, negotiation, mediation, and contribution to the preparation of draft responses. • Building relationships with customers, stakeholders and the community. • Problem solving potential politically sensitive customer conflicts to minimise the risks to the reputation of the Public Trustee. • Ensuring that customers and their supporters/stakeholders are advised of the range 	<ul style="list-style-type: none"> • Adheres to the Acts, Regulations, Policies and Procedures. • Effective cross team and departmental relations are fostered which facilitate business improvement initiatives and improved customer service delivery • Establishes objectives and milestones for self or the team • Prioritises work activities and adjusts priorities when appropriate



	<p>of Public Trustee services and products and are encouraged to use the services of the Office.</p> <ul style="list-style-type: none"> • Working collaboratively with staff across the Public Trustee and with other Govt Agencies. • Representing the Public Trustee at the State and Federal level as required. • Developing and implementing appropriate quality services standards, policies and procedures. • Actively participating and contributing in responsible and safe work practices. • Establishes courses of action for self and others to ensure that work is completed efficiently. • Indicating through actions and decisions a sense of importance to get the job done at the highest quality. • Assist in the review and management of complex legal issues. • Represent Public Trustee in Tribunal and Court proceedings. 	<ul style="list-style-type: none"> • Monitors and constantly works towards improving customer service delivery • Allocates sufficient time for completing own and other's work requirements, avoids scheduling conflicts and develops appropriate timelines and milestones • Prioritises tasks and schedules activities to avoid conflicting deadlines • Commits to effective action after developing and weighing alternatives, which take into consideration resources, constraints and organisational values. • Identifies key issues and opportunities that impact on performance and takes appropriate action to rectify • Removes barriers and overcomes obstacles and makes repeated attempts to meet objectives despite barriers.
<p>Drive Culture</p>	<ul style="list-style-type: none"> • Pro-actively safeguard the health and wellbeing of staff by ensuring safe work practices are undertaken by self and others in the workplace; • Embrace and encourage diversity and cultural differences in the workplace. 	<ul style="list-style-type: none"> • Pro-active measures are undertaken to adhere to and prevent injuries; • Work practices are safe and Work Health and Safety legislation, policies and procedures are implemented; • Individual differences are encouraged and accommodated in the workplace.



Technical Expertise

Qualifications, Skills, Knowledge and Experience relevant to the role

Technical Expertise (Essential)	<ul style="list-style-type: none"> • Proven ability to motivate, manage, train and develop people • Proven time management and organisational abilities • Excellent written and oral communications skills, including the preparation and provision of briefings and reports to executive and senior management. • Experience in managing a team, particularly in a climate of continuing change • Proven ability to analyse, exercise sound judgement and make decisions in relation to the work undertaken by customer service branches. • Strong problem solving, conflict management and negotiating skills. • Proven ability to: create, maintain and enhance relationships with customers, staff and others. • Ability to plan, implement and manage the activities and outcomes required of the position relevant to the management of WHS, equity and diversity. • Demonstrated knowledge and understanding of either the administration of estates and/or Will making or financial accounting and reporting. • Experience in interpreting and working with legislation, policies and procedures. • Experience in providing expert technical, advisory or consultation services relevant to the industry. • Knowledge of risk management assessment
Technical Expertise (Desirable)	<ul style="list-style-type: none"> • Tertiary qualifications in a relevant discipline • Good knowledge of the products and services of the Public Trustee • Experience in researching, developing, implementing and evaluating strategic policy and plans. • Understanding of current and emerging legal, regulatory, auditing, accounting and financial reporting reforms affecting customers (eg Real Estate, Taxation and superannuation changes and Centrelink entitlements.)

Behavioural Capabilities

The AGD Performance Matrix describes the behaviours expected of AGD employees across various levels in the Department.

Descriptors below detail the behavioural capabilities required for performance in the Team Lead role. KEY behaviours for this role are listed with the critical behaviours highlighted in **bold**. This broader group of behaviours are applicable to your ongoing success in the role.

	Strategic Focus	Results Orientation	Service Delivery Excellence	Relationship Management	Professional Approach and Drive
Strategic	Shapes Strategic Thinking and Change	Achieves Organisational Results	Drives Business Excellence	Forges Relationships and Engages Others	Exemplifies Personal Drive and Professionalism
Tactical	Promotes Strategic Thinking and Change	Achieves Team Results	Delivers Business Excellence	Establish Relationships and Engages Others	Models Personal Drive and Professionalism
Operational	Supports Strategic Direction	Achieves and Monitors Own Results	Supports Service Delivery Excellence	Fosters Working Relationships	Supports Personal Drive and Professionalism
Foundational	Understands the Strategic Direction	Achieves Individual Results	Contributes to Service Delivery Excellence	Maintains Working Relationships	Demonstrates Personal Drive and Professionalism



Category and level	Behaviours
Strategic Focus Operational	<ul style="list-style-type: none"> • Supports strategic direction and plans • Identifies and manages risk as appropriate and escalates as necessary • Communicates plans in practical terms to others • Contributes to the drive for change and innovation
Results Orientation Tactical	<ul style="list-style-type: none"> • Provides clear direction on how to achieve outcomes • Develops plans with clear outcomes and supports others to achieve these • Is accountable for the delivery of quality, timely and cost effective results • Confidently makes decisions showing good judgement
Service Delivery Excellence Operational	<ul style="list-style-type: none"> • Identifies and delivers high quality internal and external customer service • Utilises available internal and external resources for optimal outcomes • Uses capability and expertise of the workgroup to achieve outcomes • Provides clear, honest and timely feedback to others including recognising high performance and addressing non-performance
Relationship Management Operational	<ul style="list-style-type: none"> • Effectively manages conflict and escalates when appropriate • Openly shares information and knowledge as appropriate • Collaborates with relevant stakeholders • Actively listens and communicates clearly
Professional approach and drive Tactical	<ul style="list-style-type: none"> • Promotes a culture of respect and high ethical standards • Demonstrates and promotes professionalism and confidentiality • Promotes a high standard of wellbeing for self and others • Seeks feedback on performance and engages in self reflection

Acknowledged by occupant

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(Print name)

(Signature)

Acknowledged by line manager

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(Print name)

(Signature & title)

