Job and Person Specification

Title of Role:	Operations Coordinator, Customer Accounting	**Classification:**	ASO7
Business Unit:	Public Trustee	**Position Number :**	

Primary Purpose

The Operations Coordinator, Customer Accounting will work closely with the Manager, Customer Financial Services and Team Leaders to manage workforce planning for the branch and operational leadership in delivering effective business services to our customers. The role is responsible for the leadership and risk management of the customer transaction processing including accounts payable, accounts receivable, customer funds and customer asset management for a large time sensitive customer base.

The role provides branch-wide operational leadership, guidance and oversight of teams and may exercise supervisory responsibilities, including the coordination of staff, projects and branch activities, with or without direct reporting relationships.

Job Environment

The Operations Coordinator, Customer Accounting operates within the framework of relevant legislation, Public Trustee policies and procedures, financial management principles, government accountability requirements and departmental guidelines. The role is required to exercise judgement in managing competing priorities, resolving operational issues, influencing outcomes across the branch and identifying opportunities for continuous improvement.

The Customer Financial Services Branch is responsible for the financial management and investment of customer assets. Total customer funds under management of approximately $1.2 billion. In addition, there are other customer assets under management of over $0.6 billion. The position manages processing of $0.5 billion in annual customer financial transactions.

Reporting Relationships

- Reports to Manager, Customer Financial Services
- Provides operational leadership and direction across the branch.

Key Relationships/Interactions

- Public Trustee Customer Financial Services staff
- Public Trustee Executive Team
- Customer Services Branches - Financial Administration and Estate Services
- Taxation Services
- Other branches of Public Trustee
- Regulatory bodies
- Service providers
- Audit Office of South Australia
- Department of Treasury and Finance

Key Challenges

- Overseeing the delivery of an efficient high-quality general ledger, customer asset management, accounts payable and accounts receivable for a large customer base in a trust accounting environment.
- Ensuring compliance with Accounting Standards, the Public Finance and Audit Act and Treasurer's Instructions
- Ensuring appropriate controls are implemented to manage risk and maintain quality and compliance standards.
- Leading and driving high levels of customer service, both to internal and external customers.

- Ensuring that the Customer Financial Services branch is trusted and respected by its stakeholders and customers for delivering professional, responsive and customer-focussed services.
- Balancing financial stewardship, service delivery outcomes and workforce capability while managing competing operational priorities and resource demands.

Special Employment 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.
- 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

- Effectively embed AGD People and Leadership Expectations into all actions, activities and work processes.
- Participate in bi-annual Performance Development Plan (PDP).
- Proactively seek learning opportunities, including in the timely completion of all mandatory training requirements.
- Comply with the Code of Ethics for the South Australian Public Sector, relevant legislation and AGD policies and procedures.
- Employment is dependent upon a compliant National Police Certificate that the AGD finds satisfactory.

Diversity

The Attorney-General's Department values workplace diversity and is committed to providing an inclusive work environment where employees feel respected, valued and empowered to be themselves, we are also committed to reconciliation and strongly value First Nation's perspectives in the community and workplace.

Flexible Working Arrangement Options

The South Australian public sector promotes diversity and flexible ways of working. You are encouraged to discuss the flexible working arrangements for this role. Flexible working arrangement options for this role may include:

- Flexitime
- Work from home arrangements

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 *Operations Coordinator, Customer Accounting* is responsible for:

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
Service Delivery	• Oversee the timely and accurate processing of customer payments and related functions, including payments for food, clothing, medications and other critical living expenses. • Oversees the day-to-day operational integrity and reconciliation processes of the customer accounting general ledger. • Monitor branch performance against customer transaction processing, compliance and service level targets and implement corrective action where required.	• Internal and External Customer satisfaction meet or exceeds agreed levels. • The distribution of customer funds (particularly critical customer payments) and accounting of all customer assets meet agreed KPIs.

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
	• Ensure the timely and accurate receipting and allocation of funds to customer accounts. • Ensure accurate recording and safeguarding of customer assets and personal effects. • Ensure controls operate effectively including bank reconciliations, segregation of duties etc. • Lead the production of the 'Statement of Trusts being Administered' specific purpose financial report and a range of other end of year reports that comply with Australian Accounting Standards, Treasury Guidelines and other audit and legislative requirements. • Assist with the compliance relating to the Anti Money Laundering and Counter Terrorism Financing Act 2006 • Ensure Business Continuity arrangements are in place and operational. • Develop and report on the achievements of service level performance measures relating to customer financial transactions.	• Reconciliations are conducted within agreed timeframes. • All annual branch business objectives are met. • Risks, issues and non-compliance matters are identified and escalated in a timely manner. • External stakeholder satisfaction is maintained at high levels. • Control Self Assessments are completed within timeframes. • External and internal audit requirements are satisfactorily met.
Business Operations and Continuous Improvement	• Analyse operational, financial and performance information to identify trends, emerging risks and opportunities for improvement. • Responsible for implementing and monitoring risk treatments, ensuring compliance and managing Control Self-Assessment risk reporting. • Risk assessment consistent with Government mandated financial policies and procedures, the Public Finance and Audit Act and Public Trustee risk management requirements. • Contribute to the development, maintenance and effective application of customer financial management policies and procedures. • As primary operational contact for all IT systems used to provide customer financial transaction services, is responsible for establishing service level agreements with ICT, overseeing performance and contributing to ongoing development and enhancement of systems • Drive continuous business improvement and the implementation of modern customer orientated practices.	• The treatment and management of risk complies with all relevant policies. • Business risks are managed in a timely manner. • Agreed quality, compliance and performance standards are achieved. • Controlled self-assessments meet all agreed standards. • ICT system service delivery and development is proactively managed and service providers effectively held accountable for performance.
Leadership and Management	• Act as second-in-charge for the Customer Financial Services Branch and undertake delegated management responsibilities in the absence of the Manager. • Establishing and reviewing service standards, as well as agreed objectives and measures with each staff member. • Managing branch resources to ensure the required work is completed to schedule. • Ensuring each staff member participates in effective professional development through mentoring and formal training. • Providing appropriate mentoring and advice to staff. • Providing regular feedback on performance, effectively address staff performance issues, including managing performance improvement plans as required.	• Workforce resources are effectively allocated and service delivery targets are achieved. • Individual staff members agree to and reach individual performance targets. • Staff members participate in professional development. • Every staff member has an up-to-date performance plan and annual performance review.

Key Responsibilities	Specified Duties	Performance Indicator/Measurement
	• Ensure recruitment and professional development opportunities are merit based.	• Staff performance issues are effectively addressed.
Business Engagement	• Build and maintain effective relationships with key internal and external stakeholders to support branch and organisational objectives. • Contribute to the Public Trustee's strategic plan, • Corporate business and financial strategies • Plan, implement, evaluate and manage financial projects and tasks, whilst considering operational and financial constraints or issues.	• Internal Stakeholder satisfaction is maintained at high levels. • A proactive contribution is made to the broader Public Trustee strategic planning process. • Meaningful contributions are made to strategic, financial and business planning activities.
Drive Culture	• Role model constructive behaviours in line with AGD's leadership expectations of self-awareness, building trust, and building teams. • Actively seek feedback and engage in critical self-reflection. • Establish and maintain effective relationships with employees including being approachable, providing role clarity, guidance on work-related matters and managing conflict where necessary. • Proactively build the capability of employees by supporting learning opportunities and providing regular feedback on performance. • Proactively manage operational leadership requirements such as leave requests, timewise entries and conduct recruitment processes where necessary. • Identify and undertake personal professional development in the area of leadership. • Proactively 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.	• Feedback on performance from direct reports, peers and leaders is positive. • Regular one on one meetings with direct reports are conducted. • Performance issues, both technical and behavioural, are addressed in a timely and effective manner. • Professional Development Plans for direct reports are completed in a timely fashion. • Regular leadership development is undertaken. • Proactive 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.

Capabilities relevant to the role (Qualifications, Skills, Knowledge and Experience)

Essential	• Ability to effectively lead, manage, motivate and support teams. • Appropriate degree in Accounting, Business or related discipline • Demonstrated ability to develop a constructive, accountable and customer-focused workplace culture. • High level interpersonal, communication and stakeholder engagement skills, with the ability to establish productive working relationships and communicate complex financial information to diverse audiences.

	• Demonstrated ability to provide operational leadership, exercise sound judgement and make decisions in a complex customer-focused financial services environment. • Professional membership, or eligibility for membership, of CPA Australia, or an equivalent professional accounting body. • Experience in the implementation and maintenance of accounting and financial management systems, the development of and production of appropriate financial reports. • Experience in conducting financial analysis. • Demonstrated experience leading business improvement initiatives and implementing operational efficiencies. • Proven ability to develop policies, training procedures and compliance programs. • Demonstrated ability to analyse and conceptualise problems and risks, formulate and execute appropriate solutions and negotiate successful outcomes in an innovative and resourceful manner. • Successful record of identifying customer and business needs, developing service strategies, and provide quality customer service in either a public or private sector environment. • Ability to plan, implement and manage the activities and outcomes required of the position relevant to the management of WHS, equity and diversity. • Sound understanding of the principles of accountability in public administration. • Experience in managing a team, particularly in a climate of continuing change.
Desirable	• Experience in trust accounting and transaction processing for high- volume customer based financial operations. • Experience working in a trustee, fiduciary, public sector or regulated financial services environment. • Experience managing or leading operational teams within a customer-focused financial services environment.

Behavioural Capabilities and AGD People Expectations

The AGD Performance Matrix describes the behaviours expected of AGD employees across various levels in the Department. All employees are expected to behave in accordance with the AGD People Expectations of being self-aware, building trust and building teams. Descriptors below detail the behavioural capabilities required for performance in the *Operations Coordinator, Customer Accounting*. 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

Element	**Behaviours**
Promotes Strategic Thinking and Change	• **Actively promotes goals and strategic direction** • **Translates strategies and goals into achievable plans** • Ensures work goals are linked to the bigger picture • **Adopts and manages a balanced approach to risk aversion and risk taking** • Considers the broader political environment and context when decision making

	• Sets aside time to engage in forward planning for their area of responsibility • **Drives effective change** • **Promotes creative and innovative thinking**
Achieves Team Results	• 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** • Critically evaluates the problem in its entirety before identifying and implementing best possible solution • **Confidently makes decisions showing good judgement** • Effectively prioritises and re-negotiates tasks as needed • **Reviews performance and seeks opportunities to implement continuous improvement**
Delivers Business Excellence	• **Identifies trends, potential problems and opportunities and incorporates into plans** • Identifies and manages capability and expertise of the workgroup to achieve outcomes • Promotes and ensures a strong focus on internal and external customer service • Effectively manages and coordinates resources for optimal outcomes. • **Promotes a culture of financial responsibility, accountability and awareness** • Sets clear performance standards that are linked to business unit outcomes. • **Effectively manages their own, individual and team performance and contribute to the business unit** • Provides clear, honest and timely feedback, including addressing non-performance promptly and recognising high performance. • **Provides leadership and support for those they manage in dealing with staff performance issues.**
Establish Relationships and Engages Others	• Represents the agency and public sector effectively in public and government forums • **Effectively identifies, manages and resolves conflict** • Maintains awareness of the political context and acts accordingly • **Develops effective working relationships and internal and external networks** • **Appropriately identifies and collaborates with relevant stakeholders** • Shares information and knowledge • Tailors approach and communication style to suit the situation and audience • Identifies opportunities to negotiate for improved outcomes • **Actively listens and communicates in a clear and concise manner**
Promotes Personal Drive and Professionalism	• **Builds a culture of respect and high ethical standards** • **Promotes diversity and uses this to enhance outcomes** • Demonstrates and promotes professionalism and confidentiality when dealing with sensitive issues • Willing to put own views forward and challenges opposing views in a respectful manner • Identifies and considers risk in decision making • **Remains positive and recovers quickly from setbacks** • **Promotes adaptability in dealing with change** • **Seeks opportunities to strengthen areas for development** • Seeks feedback on performance and engages in self reflection • **Promotes a high standard of wellbeing for self and others**