

## Statement of Duties

TITLE:	Finance and Investments Manager
POSITION NUMBER:	850240
DIVISION / BUSINESS UNIT:	Finance and Investments
LOCATION:	Hobart
AWARD/CLASSIFICATION:	Tasmanian State Service Award, General Stream Band 7

## Organisational Context

The objective of the Public Trustee is to offer quality, independent Trustee Services to the Tasmanian community and as a Government Business Enterprise provide a return on capital to Government.

In seeking to achieve the mission and vision of the Public Trustee, the primary values of the staff, management and Board of Directors are:

- Respect - personal and professional respect for each other and our clients
- Service - a client service focus achieved by team work across the whole organisation
- Integrity - open, honest and ethical service delivery.

Employees are expected to uphold these values through appropriate workplace behaviour and to actively contribute to organisational and team objectives.

## Position Objective

The Finance and Investments Business Unit of the Public Trustee provides services to the organisation in the areas of strategy development and monitoring, finance, payroll, corporate reporting, investments, procurement, taxation services information technology and records management. The Business Unit also provides secretarial services to the Board and Investment Committee.

This position contributes to the efficient and effective operation of the Public Trustee by:

- providing effective leadership and management to the Finance and Investments Business Unit; and
- managing the delivery of the Public Trustee financial services in the areas of finance, corporate reporting, investments and procurement to support the operations of the Public Trustee.

## Reporting Structure

The Finance and Investments Manager reports to the Chief Financial Officer/Company Secretary and operates with a significant degree of independence and considerable autonomy.

## Major Functions

1. Manage and coordinate the day to day activities of Finance staff including allocation of work, performance management, change management, identification of learning and development needs, and leave approvals etc.
2. Preparation of the Public Trustee's annual budget and financial statements for review by the Executive Management Team and provision of regular and timely reporting on results both internally and externally.
3. Manage the day to day operations of the financial and trust accounting systems of the Public Trustee including:
  - the balancing and reconciliation processes and monitoring the daily cash flow of the organisation;
  - implementation of control systems;
  - trust administration accounting and taxation systems and procedures;
  - processing of payments and receipts;
  - insurance; and
  - quarterly, half yearly and annual financial reports in accordance with Government Business Guidelines.
4. Manage the day to day activities and key processes for the investment of the Public Trustee's funds under management in accordance with approved delegations and guidelines and set crediting rates for common fund contributors.
5. Provide high level advice to the organisation, as required, in all aspects of financial management and investment functions.
6. Develop, implement and review policies, practices and procedures within areas of responsibility, ensuring compliance with relevant legislation and Treasurer's Instructions.
7. Act as Secretary to the Investment Committee.
8. Undertake project work as required, ensuring projects are delivered on time and within budget.
9. Undertake the role of Chief Financial Officer/Company Secretary as directed, in the incumbent's absence.

## Knowledge and Skills (Selection Criteria)

Candidates should address the selection criteria in the context of the position objectives and the major functions. All applicants will be assessed against these criteria.

1. High level financial management skills including demonstrated experience and knowledge of budget and financial statement preparation, financial analysis, standards, compliance and contemporary accounting practices including trust accounting and taxation accounting.
2. An understanding and appreciation of investment management, funds management and investment operations, particularly in the application of the responsibilities of a Trustee Company.
3. Demonstrated capacity to lead and manage a team in accordance with contemporary human resource management practices and Public Trustee values to ensure effective Business Unit outcomes.
4. Demonstrated ability to promote co-operation, teamwork and understanding with the ability to develop productive working relationships and the ability to lead and motivate to gain the cooperation of others in the achievement of difficult and sometimes conflicting objectives.
5. Effective interpersonal, communication, liaison, negotiation and conflict resolution skills and the ability to clearly articulate complex and difficult issues to others in terms which are understandable by the audience.
6. Highly developed conceptual and reasoning skills to research, investigate, analyse, evaluate and integrate solutions.
7. Demonstrated self-management, time management and organisational skills including the capacity to manage pressure and multiple deadlines.
8. Significant knowledge of project management theory and demonstrated experience of the practical application of project management processes across a typical project lifecycle.
9. Demonstrated capacity to behave in accordance with, and promote the Public Trustee's values and associated behaviours, personally modelling a high standard of ethical behaviour.

### Desirable qualifications

Appropriate tertiary qualifications, such as accounting and commercial qualifications. Eligibility for membership of the Australian Society of Certified Practising Accountants or the Institute of Chartered Accountants Australia or equivalent.

### Requirements

The Head of State Service has determined that the person nominated for this vacancy is to satisfy a pre-employment check before taking up the appointment, promotion or transfer.

The following checks are to be conducted:

1. Pre-employment checks
  - Arson and fire setting
  - Violent crimes and crimes against the person
  - Sex-related offences
  - Drug and alcohol related offences
  - Crimes involving dishonesty
  - Crimes involving deception
  - Making false declarations
  - Malicious damage and destruction to property
  - Serious traffic offences
  - Crimes against public order or relating to the Administration of Law and Justice
  - Crimes against Executive or the Legislative Power
  - Crimes involving Conspiracy
2. Disciplinary action in previous employment.
3. Identification check.

### Selection Process

The Public Trustee promotes equity in employment. It provides workplaces that are free from discrimination and recognises and utilises the diversity of the community it serves. In doing this, the Public Trustee acknowledges the individual differences that can contribute to the capacity of a person to perform the inherent requirements of the duties.

Employment decisions are based on merit. On that basis:

- an assessment is made of the relative suitability of the candidates for the duties,
- the assessment is based on the relationship between the candidates' work related qualities and the work related qualities genuinely required for the performance of the duties. Work related qualities might include: skills and abilities; qualifications; training and competencies; standard of work performance; capacity to produce required outcomes; relevant personal qualities and demonstrated potential for future development,
- the assessment focuses on the relative capacity of the candidates to achieve outcomes related to the duties, and
- the assessment is the primary consideration in making the decision.

Shortlisted applicants may be required to undergo a psychometric assessment.

### Working Environment

The expected behaviours and performance of the Public Trustee employees and managers are governed by the *State Service Act 2000* through the State Service Principles and Code of Conduct. These can be located at [www.dpac.tas.gov.au/divisions/ssmo](http://www.dpac.tas.gov.au/divisions/ssmo).

The Public Trustee is committed to high standards of performance in relation to the provision of equal employment opportunity. All employees are expected to promote and uphold the principles of fair and equitable access to employment/promotion, personal development and training and the elimination of discrimination and harassment from the workplace.

In accordance with the *Work Health and Safety Act 2012* (the Act) all employees, whilst at work, are expected to participate in maintaining safe working conditions and practices, and take reasonable care for their own health and safety, ensuring their actions do not adversely affect the health and safety of others. All employees are expected to comply with any reasonable instructions given by the Public Trustee to ensure compliance with the Act; and cooperate with Public Trustee Workplace Health and Safety Policies, Procedures and Guidelines

The occupant of this position is expected to contribute to the Public Trustee's duty of care to comply with the Act by ensuring members of their team(s) adhere to the responsibilities and expectations outlined above; and to be proactive in identifying and managing hazards in the workplace.

The occupant of this position may be required to operate screen-based equipment for more than 25% of the time.

The position is located in a smoke free, office based working environment.

Date of Issue: January 2019.

# Values and Behaviours

**SERVICE** - a client service focus achieved by team work across the whole organisation

We will take the time to listen to clients and understand their needs.  
We will deliver our services to our clients in a timely, accurate and caring manner.  
We will be approachable and accessible to our clients and proactively keep them informed.  
We will address clients' concerns and ensure that identified issues are resolved.  
We will accept responsibility for following through on commitments given to clients.  
We will take responsibility for making prompt and effective decisions.  
We will help each other out by sharing knowledge and resources.  
We will work with each other to continuously review the way things are done and seek better ways of doing things.  
We will present ourselves in a professional manner.  
We will work together cooperatively to achieve the goal of excellent client service.

**RESPECT** - personal and professional respect for each other and our clients

We will treat everyone in a courteous, professional manner.  
We will respect confidentiality at all times.  
We will show empathy and consideration in our dealings with others.  
We will value diversity and respect difference.  
We will demonstrate good practice in people management.  
We will consult with people about matters that affect them directly.  
We will treat others the way we would like to be treated ourselves.

**INTEGRITY** - open, honest and ethical service delivery

We will be honest and impartial in all our dealings.  
We will operate in an open and transparent manner.  
We will be receptive to the suggestions and contributions of others.  
We will make decisions in a fair and balanced manner.  
We will interact with everyone in a way that builds trust.  
We will be personally accountable for our actions.  
We will consistently keep our commitments and maintain confidentiality.

## GUIDELINES FOR APPLICANTS

The Public Trustee is a Government Business Enterprise (GBE) established under the *Government Business Enterprises Act 1995*. As a Government Business Enterprise the Public Trustee is expected to operate within a commercial environment with other competitors in the market such as solicitors and private Trustee companies.

The principal legislation under which we administer our estates and trusts on a day to day basis is *The Public Trustee Act 1930*. We have four offices throughout Tasmania in Hobart, Launceston, Burnie and Devonport.

The initial step in the selection process is the comparison of applicants to the selection criteria which are derived from the statement of duties. It is important that you ensure you clearly address the selection criteria in terms of knowledge, experience, skills, qualifications and potential for future development in your application. Applicants will be selected for interview on their ability to meet the criteria and interview questions will also be based on the selection criteria. Your application should also contain a Form 201 Tasmanian State Service Application for employment and a resume or curriculum vitae.

Referee reports are an important part of the selection process and may be used by a selection panel to gain information about your performance or background. Referees should therefore be able to comment on your work related performance. We would also suggest that as a matter of professional courtesy, you advise your referees on your intention to nominate them to support your application.

More information about the Public Trustee can be obtained from our web site at [www.publictrustee.tas.gov.au](http://www.publictrustee.tas.gov.au). The contact officer nominated in the advertisement will be pleased to discuss the duties of the position, or any other particular query you may have. Please do not hesitate to contact them.

The selection panel may decline to consider any application below the necessary standard or that does not provide adequate information in response to the advertisement. Unfortunately, an application received after the closing date may not be accepted.

We look forward to receiving your application.

## SUGGESTIONS ON ADDRESSING THE SELECTION CRITERIA

Selection criteria describe the particular skills, abilities, knowledge and qualifications (if any) required to achieve the outcomes of the position. Applicants are rated against the criteria in order to select the most meritorious applicant. Each criterion should be answered individually.

The following process is a guide to assist you in answering selection criteria.

1. Read the selection criteria, position objectives and major functions carefully.
2. Identify the major factors in each selection criterion.
3. Determine how you meet each criterion
  - a. The introduction might be 'I possess a high level of skill in ...' identifying things you do in relation to this criterion.
  - b. You should then support this statement, such as 'In my role of ... I have ...'. This is an example of a previous situation where you have demonstrated a particular skill or ability, giving consideration to what tasks were involved, or how you would apply the skill or ability.
  - c. Expand on your previous statement by describing (step by step) what was involved in the process.
  - d. You should then provide some form of validation that demonstrates how you know the task undertaken was done correctly or well. This might take the form of accredited training, validation from superiors, customer satisfaction surveys etc.
4. It is best to use positive language from a personal perspective unless you are referring to a team situation whereby you should provide insight into your particular role within the team.
5. Ensure that you have not over or undersold yourself.

### Tips

- Where appropriate, use dot points in your answers to help with clarity;
- The length of your response will vary on the level of your position but should range from ½ to 1 page for each criterion. The more senior the position, the more detailed the response;
- In addressing criteria in relation to Estate and Trust work, think about past experience in other fields that might be relevant. When a person dies and leaves a will with the Public Trustee, we are responsible for administering the estate, particularly in relation to financial affairs. Trusts entail looking after someone's financial affairs that might be unable to look after those themselves, such as a minor or someone who does not have the physical or mental capacity to do so. Some relevant experience might include conveyancing, financial dealings or welfare or client contact areas such as Centrelink. There are a variety of skills that are required in dealing with these issues from legal aspects to communication. Even if you don't have specific experience, think about how you might go about dealing with Estates and Trusts and what skills you could apply.