



Professional Development Opportunities for Ratings Staff and Managers

NSW Rating Professionals
Inc Training Program



NEW PROGRAM

Sydney Venue
August – November
2007

Course outlines are on the following pages.

Course Dates

August 9th - 10th

August 16th - 17th

September 21st - 22nd

September 27th – 28th

October 11th - 12th

October 25th - 26th

November 8th - 9th

December 6th - 7th

Module

Debt Recovery

Introduction to Local Government and the Basics of Rating

Major Policy Issues in Rating

Rates Financial and Property Controls 1

Rating Issues at the Enquiry Counter

Rates Financial and Property Controls 2

Debt Recovery

Introduction to Local Government and the Basics of Rating

Course Fee \$495 + GST per module

Please note early registration is strongly advised. Courses will run subject to viable numbers.



COURSE FACILITATOR

Richard Whitmore has had over twenty years experience in Local Government, much of this involved in Rating, including seven years as a Chief Rates Clerk at Hawkesbury City Council.

Richard has been a guest speaker at numerous Local Government conferences and was a member of the IMM Finance Professionals Committee. Several Councils have regularly hired him as a consultant.

His laid back, humorous style of training has been immensely popular with course participants. To date he has written five new texts for the NSW Rating Professionals, totalling some 550 pages –More texts will follow.

VENUE

Y Hotel Conference Centre

5 – 11 Wentworth Ave, Sydney

The venue is situated close to Central Station and has accommodation.

Please refer to the venue's website for further venue information.

http://www.yhotel.com.au/Yhotel_conference_facilities.htm

CATERING

There is tea and coffee supplied on arrival.

Morning tea and lunch are provided on each day.

Please advise Hunter Councils Learning and Development of any dietary requirements.

REGISTRATION

To register, please complete a Hunter Councils registration form at

<http://www.huntercouncils.com.au/training/index.html> and submit online or you can download a form and fax to Hunter Councils on (02) 4966 0588

PREREQUISITES

Prior to undertaking any modules it is expected that the participant(s) is/are competent in the relevant prior modules, in particular modules 1 & 2.



Introduction To Local Government And The Basics Of Rating

PART ONE – WHAT EVERYONE WORKING IN LOCAL GOVERNMENT NEEDS TO KNOW

- Understanding Local Government
- Organisational Structures Within Councils
- Communication Channels Within Councils
- Local Government and the Law
- Interpreting Statutes
- The Acts You Need to Know About
- Negligence and Defamation
- Sources of Income to a Council in NSW –and the Ideology behind the way Income is Raised
- The Department of Local Government
- The Valuer General's Office
- Policy Making Explained

PART TWO – STARTING OFF IN RATING

- The Basics of Categorisation
- Calculating "Ad Valorem" Rates
- Ad Valorem Rates with Special Rates & Charges
- Introducing Base Amounts
- Minimum Rates
- An Overview of the Draft Revenue Pricing Policy and the Management Plan
- The Main Levy – What to Expect
- Options for Payment
- An Overview of Concessions
- Liability for Rates and Charges
- Occupational Health and Safety
- The NSW Rating Professionals Inc

Rating Issues At The Enquiry Counter

PART ONE: CUSTOMER SERVICE ISSUES

- Customer Service – from the Customer's Perspective
- Dealing with Difficult Customers
- Enquiries that Should be Directed Elsewhere and Those that Should be put in Writing
- Policy Issues Affecting Rating
- An Overview of Cashiering
- Managing Your Time and Preparing for Peak Periods
- How Enquiry Staff can Become a Link Between Customers and Management

PART TWO: YOUR GUIDE TO RATING ENQUIRIES

- Details on the Rates and Charges Notice and Using Your Rating File
- Counter and Telephone Enquiries with Rates and Instalment Notices
- Some Common Valuation Enquiries
- Categorisation Enquiries
- Pensioner Rebates
- Postponed Rates and Charges
- The Issue of Financial Hardship
- Some Sundry Enquiry Issues
- Overview of the Privacy and Personal Information Protection Act 1998
- Overview of changes to Water Supply, Sewerage and Liquid Trade Waste Charges



Rates Financial And Property Controls – 1

PART ONE: RATES FINANCIAL CONTROLS

- Methods of Payment and Their Audit
- Journal Adjustments for Cash Items
- Journals Adjusting the Levy
- Designing Journals for Transparency
- Some Quick Tips on Avoiding Reconciliation Problems with Journals

PART TWO: UNDERSTANDING BASIC ACCOUNTING AND YOUR COUNCIL'S FINANCIAL STRUCTURE

- Some Basic Accounting Principles
- The Financial Structure of a Council
- Linking Rates Transactions to the General Ledger
- Accounting – The Big Picture
- The Financial Statements

PART THREE: PROPERTY INFORMATION

- Land Titles
- Section 603 Certificates and Notices of Transfer



Rates Financial & Property Controls – (2)

Designed for Rates Managers and Assistant Rates Managers, or anyone else who wants to substantially develop their Rating knowledge.

This is the sixth training module made available by the NSW Rating Professionals. It comprises a two day course and a 112 page book covering:-

The Main Levy. All stages are covered in chronological order – from the preparation in March through to the mailing of the Notices.

Supplementary Levies.

General Revaluations. You are taken through it step by step from beginning to end.

The text can be used as a progressive check list. It covers closing off procedures, trial levies and test printing environments and why each procedure is important.

The layout of the book is designed for the newcomer to not only follow easily but understand the background to every stage. The experienced practitioner will also be quickly able to refer to the highlighted "tips" and "troubleshooting" sections as reference points.



Debt Recovery

Included in content:

- Finding a method of debt recovery that suits you.
- Establishing policy and a debt recovery programme from performance statistics.
- Rating issues that can adversely affect legal action.
- Some examples of how to avoid bad debts in accounts receivable.
- How you can set up time saving internal control systems to manage debt recovery in both Rates and accounts receivable, including system maintenance and reporting.
- All about arrangements and letters of demand.
- Procedures for sale of land for unpaid Rates and garnishees of rent.
- The new draft ACCC/ASIC code of practice for debt recovery with excerpts and commentary.
- Sections of the Local Government Act relating to debt recovery fully explained.
- Locating debtors and going out into the field.
- Issues and ideas on minimising risk to yourself in legal and other situations.
- 14 page overview of legal action, processes including statements of liquidated claim, judgement, writ, bankruptcy, examining debtors etc.



Major Policy Issues for Rating

Included in content:

- Practical examples of creating Rating structures.
- Demographic and socio-economic factors.
- Commentary on some of the major legal requirements involved in creating the Revenue Pricing Policy (Water and Sewer overview only, to be dealt with in detail in another module).
- Relating Rating and charging revenues to expenditure needs.
- Projecting the costs of pensioner rebates and associated policy decisions relating to an aging population.
- Using Rating data as general statistical information for other areas of Council policy making - and how to achieve this.
- Debt recovery policy options.