|  |  |
| --- | --- |
| **Cluster** | Planning and Environment |
| **Agency** | Department of Planning and Environment |
| **Division/Branch/Unit** | Corporate Services/Cluster Finance |
| **Classification/Grade/Band** | Clerk Grade 7-8 |
| **Location** | Sydney/Orange |
| **Role Family** | Bespoke/Finance and Economics/Deliver |
| **ANZSCO Code** | 551111 |
| **PCAT Code** | 1523292 |
| **Date of Approval** | August 2020 (updated January 2023; and January 2022) |
| **Agency Website** | www.dpe.nsw.gov.au |

**Agency overview**

Our vision is to create thriving environments, communities and economies for the people of New South Wales. We focus on some of the biggest issues facing our state. We deliver sustainable water resource and environment management, secure our energy supply, oversee our planning system, maximise community benefit from government land and property, and create the conditions for a prosperous state. We strive to be a high-performing, world-class public service organisation that celebrates and reflects the full diversity of the community we serve and seeks to embed Aboriginal cultural awareness and knowledge throughout the department.

The Corporate Services division develops, manages and advises on systems, infrastructure, policies and standards for the department in the areas of finance, procurement and administration, asset management, information and communication technology.

Primary purpose of the role

Coordinate the preparation and lodgment of all tax and treasury returns including: Fringe Benefits Tax (FBT), Goods and Services Tax (GST), Payroll Tax Returns and remittance of Pay as you Go (PAYG), Treasury recoups and payment returns for the NSW Department of Planning, Industry and Environment and customer agencies.

# Key accountabilities

* Contribute to the preparation and review of tax calculations and maintenance of tax balances in the general ledger, preparing reports and briefings to inform decision making.
* Work closely with the Manager, Tax to coordinate the data collection and consolidation of documentation relating to all noted returns ensuring the integrity of tax related data and compliance with statutory obligations
* Prepare, reconcile and lodge all DPE and customer agency ATO, Revenue NSW and Treasury returns including but not limited to: Fringe Benefits Tax (FBT), Goods & Services Tax (GST), Payroll Tax Returns, remittances of Pay as you Go (PAYG) returns.
* Research data, source information and assist with the reconciliation and remittance of crown revenue to NSW Treasury, recouping of expenses from NSW Treasury, balancing of superannuation and long service leave liabilities accepted by the Crown, as well as the completion of relevant reconciliations of the treasury ledgers and Crown Data Returns
* Forge and maintain partnerships with clients through interaction; respond to enquiries and provide assistance and guidance to increase tax compliance
* Regularly communicate with internal and external stakeholders and team members to ensure taxation documents are lodged and business unit objectives are met
* Contribute to the review, development and implementation of procedures and policies to ensure the delivery of quality taxation and transaction services
* Assist the Manager Tax Services in the coordination of the Tax Services team activities.

Key challenges

* Minimizing tax liabilities through informed application of tax laws and regulations and ensure taxation reports are accurate and integrity of data is maintained
* Balancing competing demands and priorities and ensuring adherence to taxation policies, guidelines and legislation to avoid penalties
* Maintaining current knowledge of changing State and Commonwealth legislation to ensure the department is tax compliant.

Key relationships

|  |  |
| --- | --- |
| Who | Why |
| **Internal** |  |
| Manager Tax | * Receives guidance from, discusses priorities and provides regular updates on key issues
* Identify and escalate major, new or emerging issues and recommend new approaches, strategies, practices, solutions, alternative options and responses
 |
| Customers/Business Units/Service Level Agencies | * Receive queries and respond with standard information or escalate within the unit.
* Provide advice and seek information.
 |
| Team Members | * Interact with and work collaboratively to achieve unit outcomes
* Share information and discuss solutions to problems with colleagues.
 |
| **External** |  |
| Australian Taxation Office, Revenue NSW, NSW Treasury | * Liaise with external authorities to lodge returns or clarify tax issues.
* Seek advice and provide information.
 |

# Role dimensions

## Decision making

The role operates in a structured environment subject to established policies, procedures and practices. Refers to Manager Tax for any decisions that require deviation from agreed outcomes or time frames; escalates issues or tasks that require a higher administrative or financial delegation, or submission to a higher level of management.

## Reporting line

Manager Tax

## Direct reports

Nil

## Budget/Expenditure

Nil

Key knowledge and experience

* Demonstrated experience in tax and statutory return preparation and review.
* Extensive experience in account reconciliation and demonstrated attention to detail and accuracy.

Essential requirements

* Qualification in relevant field such as accounting, bookkeeping or financial services.

# Capabilities for the role

The [NSW public sector capability framework](https://www.psc.nsw.gov.au/workforce-management/capability-framework/the-capability-framework) describes the capabilities (knowledge, skills and abilities) needed to perform a role. There are four main groups of capabilities: personal attributes, relationships, results and business enablers, with a fifth people management group of capabilities for roles with managerial responsibilities. These groups, combined with capabilities drawn from occupation-specific capability sets where relevant, work together to provide an understanding of the capabilities needed for the role.

The capabilities are separated into **focus capabilities** and **complementary capabilities**.

# Focus capabilities

*Focus capabilities* are the capabilities considered the most important for effective performance of the role. These capabilities will be assessed at recruitment.

The focus capabilities for this role are shown below with a brief explanation of what each capability covers and the indicators describing the types of behaviors expected at each level.

| FOCUS CAPABILITIES |
| --- |
| **Capability group/sets** | **Capability name** |  | **Behavioural indicators** | **Level**  |
|  | **Manage Self**Show drive and motivation, an ability to self-reflect and a commitment to learning | * Keep up to date with relevant contemporary knowledge and practices
* Look for and take advantage of opportunities to learn new skills and develop strengths
* Show commitment to achieving challenging goals
* Examine and reflect on own performance
* Seek and respond positively to constructive feedback and guidance
* Demonstrate and maintain a high level of personal motivation
 | Adept |
|  | **Communicate Effectively**Communicate clearly, actively listen to others, and respond with understanding and respect | * Focus on key points and speak in plain English
* Clearly explain and present ideas and arguments
* Listen to others to gain an understanding and ask appropriate, respectful questions
* Promote the use of inclusive language and assist others to adjust where necessary
* Monitor own and others’ non-verbal cues and adapt where necessary
* Write and prepare material that is well structured and easy to follow
* Communicate routine technical information clearly
 | Intermediate |
| **Commit to Customer Service**Provide customer-focused services in line with public sector and organisational objectives | * Take responsibility for delivering high-quality customer-focused services
* Design processes and policies based on the customer’s point of view and needs
* Understand and measure what is important to customers
* Use data and information to monitor and improve customer service delivery
* Find opportunities to cooperate with internal and external stakeholders to improve outcomes for customers
* Maintain relationships with key customers in area of expertise
* Connect and collaborate with relevant customers within the community
 | Adept |
|  | **Deliver Results**Achieve results through the efficient use of resources and a commitment to quality outcomes | * Use own and others’ expertise to achieve outcomes, and take responsibility for delivering intended outcomes
* Make sure staff understand expected goals and acknowledge staff success in achieving these
* Identify resource needs and ensure goals are achieved within set budgets and deadlines
* Use business data to evaluate outcomes and inform continuous improvement
* Identify priorities that need to change and ensure the allocation of resources meets new business needs
* Ensure that the financial implications of changed priorities are explicit and budgeted for
 | Adept |
| **Think and Solve Problems**Think, analyse and consider the broader context to develop practical solutions | * Research and apply critical-thinking techniques in analysing information, identify interrelationships and make recommendations based on relevant evidence
* Anticipate, identify and address issues and potential problems that may have an impact on organisational objectives and the user experience
* Apply creative-thinking techniques to generate new ideas and options to address issues and improve the user experience
* Seek contributions and ideas from people with diverse backgrounds and experience
* Participate in and contribute to team or unit initiatives to resolve common issues or barriers to effectiveness
* Identify and share business process improvements to enhance effectiveness
 | Adept |
|  | **Finance**Understand and apply financial processes to achieve value for money and minimise financial risk | * Understand core financial terminology, policies and processes, and display knowledge of relevant recurrent and capital financial measures
* Understand the impacts of funding allocations on business planning and budgets
* Identify discrepancies or variances in financial and budget reports, and take corrective action
* Know when to seek specialist advice and support and establish the relevant relationships
* Make decisions and prepare business cases, paying due regard to financial considerations
 | Adept |

# Complementary capabilities

*Complementary capabilities* are also identified from the Capability Framework and relevant occupation-specific capability sets. They are important to identifying performance required for the role and development opportunities.

Note: capabilities listed as ‘not essential’ for this role are not relevant for recruitment purposes however may be relevant for future career development.

| COMPLEMENTARY CAPABILITIES |
| --- |
| **Capability group/sets** | **Capability name** |  | **Description** | **Level**  |
|  | Display Resilience and Courage | Be flexible and adaptable and respond quickly when situations change | Intermediate |
| Act with Integrity | Be ethical and professional, and uphold and promote the public sector values | Intermediate |
| Value Diversity and Inclusion | Demonstrate inclusive behaviour and show respect for diverse backgrounds, experiences and perspectives | Foundational |
|  | Work Collaboratively | Collaborate with others and value their contribution | Intermediate |
| Influence and Negotiate | Use facts, knowledge and experience to support recommendations | Intermediate |
|  | Plan and Prioritise | Plan to achieve priority outcomes and respond flexibly to changing circumstances | Adept |
| Demonstrate Accountability | Be proactive and responsible for own actions, and adhere to legislation, policy and guidelines | Intermediate |
|  | Technology | Understand and use available technologies to maximise efficiencies and effectiveness | Intermediate |
| Procurement and Contract Management | Understand and apply procurement processes to ensure effective purchasing and contract performance | Foundational |
| Project Management | Understand and apply effective planning, coordination and control methods | Intermediate |