

Specialised Training for Rates, Revenue and Finance Staff in Local Government



NSW Revenue Professionals Inc. Training Program

This suite of courses is designed to provide current information and development opportunities for revenue, rating and finance professionals.

2020 COURSE DATES

DATES	MODULE	VENUE
5 & 6 March	2. Rating Issues at the Enquiry Counter	Holiday Inn Potts Point
2 & 3 April	3. Rates Financial & Property Controls 1	Local Government Training Institute - Thornton
7 & 8 May	4. Rates Financial & Property Controls 2	Local Government Training Institute - Thornton
11 & 12 June	7. Understanding Statutory Rating Requirements & the Special Schedule 9 Working Papers	Rydges Mount Panorama Bathurst
6 & 7 August	1. Introduction to Local Government and the Basics of Rating	Rydges Mount Panorama Bathurst
3 & 4 September	2. Rating Issues at the Enquiry Counter	Rydges Mount Panorama Bathurst
8 & 9 October	7. Understanding Statutory Rating Requirements & the Special Schedule 9 Working Papers	Local Government Training Institute - Thornton

COURSE INFORMATION

COURSE FEE

- Module 1. \$650 per person + GST
- Module 2. \$650 per person + GST
- Module 3. \$650 per person + GST
- Module 4. \$650 per person + GST
- Module 7. \$700 per person + GST

VENUE INFORMATION

Holiday Inn Potts Point

203 Victoria Street, Sydney.

Situated close to transport and has accommodation.

Please refer to the [Holiday Inn's website](#) for further information.

Local Government Training Institute

4 Sandringham Ave, Thornton.

Located just off the M1 motorway and within a 30 minute drive from Newcastle Airport.

LGTI can provide a list of local accommodation on request.

Rydges Mount Panorama Bathurst

1 Conrod Straight, Bathurst.

Located 2.5 hours from Sydney and 10 minutes from Bathurst Regional Airport and has several options available for accommodation.

Please refer to the [Rydges website](#) for further information.

CATERING

Morning tea and lunch are provided each day, along with all day tea and coffee.

Please advise Local Government Training Institute of any dietary requirements at time of registration.

REGISTRATION

Registration is available online via the [LGTI website](#).

CONFIRMATION THAT COURSE WILL GO AHEAD

If course registrations do not reach minimum numbers, participants will be given 7 days notice of any course cancellation. LGTI is not responsible for any costs associated with travel or accommodation that may be incurred by participants.

COURSE FACILITATOR

Dennis Gooley has 45 years of local government experience in a variety of roles. For 34 of those years, Dennis has been in rates with a few early years in debt recovery.

Dennis has trained 100s of revenue professionals, delivering professional development programs across NSW since 2009.

Dennis says:

"I am passionate about rating which is why I have taken on the training role with NSW Revenue Professionals"

RESOURCES

The course text will be emailed to participants prior to training in PDF form. Participants are encouraged to save the text to a portable device to bring along to training.

DO YOU NEED ASSISTANCE?

Please let us know if there are any issues or special requirements that the course facilitator should be made of prior to the training.

This may include literacy/numeracy issues, physical limitations or anything that may affect your experience in the training course.

MODULE INFORMATION

MODULE 1: Introduction to Local Government and the Basics of Rating

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

- Understanding local government
- Organisational structure 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 and charges
- Introducing base amounts
- Minimum rates
- An overview of the Draft Revenue Pricing Policy and the Management Plan
- How to calculate interest on overdue rates
- 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

MODULE 2: 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
- 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
- Pensioner concession reviewed

MODULE 3: Rates Financial and Property Controls – 1

PART ONE: RATES AND 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 COUNCILS' 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

MODULE 4: Rates Financial and Property Controls – 2

Designed for Rates Managers and Assistant Rates Managers, or anyone who wanted to substantially develop their rating knowledge.

This training module covers:

- The Main Levy: All steps commencing from reviewing the rating structure in August through the estimates in February to the main levy in July
- Supplementary Levies
- General Revaluations: You are taken through it step by step from beginning to end

The text can be used as a progressive checklist. 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.

MODULE 7: Understanding Statutory Rating Requirements

This course takes you through the important legal issues of categorisation, the Valuation of Land Act and the statement of compliance. There are also sections on how to handle applications for exemption from rating and making valuation controls easier.

Besides practical advice on all aspects of categorisation, there is also an individual explanation of each of the major court cases from 1993 to 2008 in easy to follow language as a reference guide. The hard work of interpreting court judgements has been taken away – often with two or more pages devoted to a single case.

For the first time ever there is also a complete, section by section guide to the Valuation of Land Act in everyday language, covering every section that has anything remotely to do with rating, and bringing up where you may have problems using some sections (and solutions). This will be an excellent reference guide for you.

There is a special part of the manual dealing with the Special Schedule 9 Working Papers in detail from the preparatory stages to conclusion, complete with 'hands on' exercises. To supplement this there is a further unit on simplifying valuation controls.

There is another section describing what to do with applications for exemption from rating, covering types of documents you need to see, collecting evidence, inspections and preparing a brief for a solicitor.