University of Edinburgh

Job Description

1. Job Details – 024

Job title: Income Manager

School/Support Department: Finance Department, Corporate Services

Unit (if applicable):

Line manager: Deputy Director of Finance

2. Job Purpose

To lead, manage and promote all aspects of the Income Section, in order to ensure (a) timely, efficient and effective collection of income owed to the University by commercial or student customers, and (b) timely, accurate and comprehensive recording and reporting of ledger information.

3. Main Responsibilities

The Income Manager is responsible for the collection of both (a) tuition fee income (from students or sponsors) and (b) operating (i.e. non-grant) income. These income categories amount to some £120m annually. The Income Manager manages 12 FTE staff, including a Deputy (CN5), two team leaders (CN4), with remaining staff at CN3 grade. Duties involve:

1. Strategy and policy
   - Playing a lead role in formulating and implementing a tuition fee collection strategy, making full use of electronic media, encouraging early payment by students, parents and other sponsors. 15%
   - Implementing University income and credit control policies and procedures, and initiating changes or improvements to these. 10%
   - Promoting best practice across the University community with regard to sales invoicing and income collection, encouraging understanding through building positive relationships with colleagues in Schools, Colleges and Support Departments, and ensuring that the University’s outward corporate image is maintained whilst promoting a customer-focussed approach. 20%

2. Operations
   - Providing leadership and guidance to the IS team and ensuring that, by excellent forward planning and co-ordination, the workload of the section is executed to the highest standard, in a timely fashion (45%)
   - Contributing to the development of EUCLID, the University’s new student administration system and, supported by colleagues in FIS section, representing the Finance Department’s operational interests in the project (10%)

4. Planning and Organising
Within parameters established by the Deputy Director of Finance, the Income Manager plans and prioritises his/her own workload and liaises with team members to ensure others actions are complete and required information is provided.

Management of both student and commercial customers requires careful forward planning using tools such as the credit control diary, in order not only to manage the regular day-to-day routine income collection, but also to monitor and manage special payment arrangements agreed by customers – students – in difficulty.

5. Problem Solving

Problem solving will reflect the types of customer being dealt with. Students must be handled firmly but fairly, as there are always genuine cases of hardship to be identified, and a very people-oriented approach is required.

Commercial customers must be handled professionally and with due regard to the University’s corporate image. It will frequently be necessary to work with both the customer and the University School/Department who provided the service in order to resolve difficulties and to facilitate payment of sums owed.

The Income Manager must exhibit tact, diplomacy, persistence and a thoroughly professional approach in order to be successful.

6. Decision Making

Decision-making is made in the context of (a) the University’s Policies on Commercial Debt Management and Collection of Student Fees and Related Charges, (b) the Finance and Income Section Manuals, and (c) guidance provided by the Deputy Director of Finance. However, a significant degree of autonomy is expected in terms of day-to-day decisions, appropriate to the grade.

7. Key Contacts/Relationships

Contacts will include (a) commercial customers based in the UK or overseas, (b) undergraduate and postgraduate students and their sponsoring bodies, (c) other bodies, such as Research Councils, charities, government departments and other universities, (d) senior academics, (e) Finance Directorate, (f) administrative support staff in Schools, Colleges and Support Groups. These groups cover the University’s customer base, from whom monies are due, or University service-providers, from whom information regarding services provided is necessary, in order to pursue effective income collection. Contact is made by telephone, face-to-face meeting, and by e-mail. Contact with the University’s solicitors will also be required.

8. Knowledge, Skills and Experience Needed for the Job

The Income Manager should meet the following criteria:

Experience

- at least five years’ experience of managing teams in a large multi-departmental organisation (essential)
- demonstrable success in staff development and training (essential)
- a strong financial management and accounting background, including experience of income collection and liaison with debtors, and a thorough understanding of financial controls (essential)
• experience of an integrated accounting package in operation in a large multi-
departmental organisation (essential)
• a sound knowledge of electronic payment systems and methods (Bacs) (essential)
• effective project management skills (essential)
• excellent working knowledge of Excel (essential)
• excellent working knowledge of Word (essential)

Specific Aptitudes and Abilities

• a logical, focused and constructive approach (essential)
• a positive, self-reliant, open-minded and enthusiastic attitude (essential)
• the ability to work both as part of the team and under your own initiative with minimum
  supervision (essential)
• the ability and discipline to plan and prioritise your own work, and to ensure that staff are
  able to do likewise (essential)
• the ability to consistently work to extremely tight deadlines (essential)

Interpersonal Skills

• excellent leadership, interpersonal and staff management skills (essential)
• excellent planning and organisational skills (essential)
• excellent oral communication skills, able to deal confidently with customers, whether
  students or commercial entities (essential)
• excellent written communication skills (essential)

9. Dimensions

The Income Manager is responsible for managing the collection of some £120m per annum.

Duties are overseen by the Deputy Director of Finance, via regular meetings. The Manager
is, however, responsible for providing leadership and guidance to the Income Section team.

10. Job Context and any other relevant information