

## Position Description

<b>Role:</b>	Team Leader, Specialised Support
<b>Business Unit:</b>	Financial Administration
<b>Classification:</b>	Career Level 3
<b>Location:</b>	Footscray /Dandenong/ Bendigo
<b>Reporting to:</b>	Head of Specialised Support and Transition
<b>Direct Reports:</b>	Consultants, Senior Consultants, Administration Support Officers

### State Trustees

State Trustees is the public trustee for Victoria, providing a vital service for more than 49,000 Victorians in financial year 2018, including more than 11,000 Victorians who, due to mental illness, injury or disability, are unable to independently manage their own financial and/or legal affairs.

Will writing, power of attorney, executor services, trustee services and financial administration are just some of the services State Trustees provides to its clients, while maximising its contribution to the economy and wellbeing of the State of Victoria.

State Trustees is a state-owned company and operates from three offices, Footscray, Dandenong and Bendigo. We employ over 440 people, look after more than \$2.26 billion in client assets and last financial year generated more than \$72 million in revenue.

At State Trustees, we are passionate about raising awareness and educating the community on issues that impact all Victorians, including the importance of wills and preventing financial elder abuse.

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### Financial Administration

The Financial Administration Division is responsible for helping clients by providing supportive services to assist them in ensuring financial security, management of legal interests and access to entitled benefits. Financial Administration clients are those Victorians who the Victorian Civil and Administrative Tribunal (VCAT) has determined should have their financial affairs administered by State Trustees. There are currently approximately 9500 VCAT appointed clients. Financial Administration employees are located at Footscray, Dandenong and Bendigo.

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### The impact you'll have....

The Team Leader, Specialised Support provides day to day supervision, coaching and leadership to the Specialised Support Team. This team manages the financial and legal affairs of our most vulnerable clients whose circumstances are complex and unique and which could further be complicated with multiple critical factors, such as the loss of formal or informal support, mental health concerns and/or disabilities, substance abuse, financial abuse, being at risk from others or demonstrates violent behaviour, at risk accommodation or difficult relations (family breakdowns or conflict) etc. These clients are appointed to us through the Victorian Civil Administrative Tribunal.

As the leader of this team you will be required to have the client at front of mind and work towards resolution of these complex circumstances with the assistance of stakeholders, your team and the client or their support network. Working collaboratively within the Team Lead peer group in the Financial Administration division and those in key business stakeholders' areas will be pivotal to not only deliver service to the clients but to drive tactical performance improvement activities.

## Accountabilities

Accountability	Key activities to deliver on accountability
Team leadership, engagement and employee development	<ul style="list-style-type: none"> <li>• Effectively supervise and provide leadership to a team of employees by:               <ul style="list-style-type: none"> <li>○ modelling behaviours integral to good people management and organisational values</li> <li>○ supporting individuals to achieve their potential while maximising their contribution to achieve their goals and outcomes</li> <li>○ building and maintaining positive relationships with peers and stakeholders across the organisation.</li> </ul> </li> <li>• Sets high standards of performance for self and others whilst contributing towards an enjoyable and supportive work environment.</li> <li>• Develop team members by actively seeking to improve skills and talents by providing constructive feedback, coaching and training opportunities.</li> <li>• Empowers team members by investing them with the authority and latitude to accomplish tasks, and through delegation of responsibilities to provide development opportunities.</li> <li>• Demonstrates consideration, concern and respect for other feelings and ideas. Adapts to the differing working styles of team members</li> <li>• Fosters a culture of trust, care, unity and passion, with a focus on continuous improvement and high performance</li> </ul>
Operational management	<ul style="list-style-type: none"> <li>• Resolve operational problems and matters being experienced by team members.</li> <li>• Investigates client situations to ensure facts and alternatives for consideration are correct. This includes evaluating rational and emotional elements of situations.</li> <li>• Where required make difficult decisions at times, when the investigation of the situation provides incomplete information.</li> <li>• Provides direction to the team and assists them with resolution of complex client circumstances as well as technical support and oversight.</li> <li>• Identifies potential and actual client escalations.</li> <li>• Mitigates risks including recommendations on Behavioural Management plans</li> <li>• Ensure timely and effective resolution of feedback, complaints and client complaints, ensuring agreed actions are implemented</li> <li>• Work closely with the Financial Counselling Advisor and Senior Management Team to identify and build capability and literacy programmes for delivery to clients who are identified to participate in the Financial Independence program</li> <li>• Comply with legislation, policies, work instructions and service standards</li> <li>• Provides sign-off in line with Team Leaders delegation of authority</li> <li>• Applies a continuous improvement lens, providing suggestions where possible</li> </ul>
Stakeholder Engagement	<ul style="list-style-type: none"> <li>• Forms meaningful relationship with external stakeholders such as the Department of Health and Human Services, Office of the Public Advocate, residential facilities, support networks to ensure clients receive benefits and services entitled to them.</li> <li>• Builds and maintains strong relationships with all key internal and external stakeholders</li> <li>• Develops, implements and manages service level agreements with internal stakeholders</li> <li>• Leverage the expertise of Stakeholders where required</li> </ul>

<b>Accountability</b>	<b>Key activities to deliver on accountability</b>
Reporting and quality assurance	<ul style="list-style-type: none"> <li>• Completes relevant daily, weekly and monthly reporting to ensure service delivery and compliance obligations are being met.</li> <li>• Monitors team's work and activities to ensure compliance with the required service levels</li> <li>• Maintains a rigorous quality review process to ensure the team's work is consistent with legislation, policies, work instructions and service standards</li> <li>• Apply continuous improvement principles to improve customer support, address reportable incident actions and meet other safeguarding and quality requirements</li> </ul>

### Decision making

Decisions made independently by this position:	<ul style="list-style-type: none"> <li>• Workflow allocation</li> <li>• Accepting or rejecting recommendations made by team members regarding strategy for responding to situations of complexity/risk</li> <li>• Accepting or rejecting recommendations made by team members for deviations to service standards</li> <li>• Managing overall team performance</li> <li>• Responding to matters in line with levels authorised by the State Trustees Client Authorities Policy and Corporate Delegation of Authority</li> </ul>
Decisions made after consultation with supervisor:	<ul style="list-style-type: none"> <li>• Formal performance management strategies, ranging from high performance to potential under performance.</li> <li>• Recommendations for addressing identified resourcing needs</li> </ul>
Decisions referred to supervisor:	<ul style="list-style-type: none"> <li>• Responding to matters beyond the State Trustees Client Authorities Policy and Corporate Delegation of Authority</li> <li>• Implementing solutions to identified resourcing needs</li> <li>• Permanent amendments to processes</li> </ul>

### Key communications

<b>Contact / organisation</b>	<b>Purpose of communication</b>
<b>Internal</b>	
Head of Specialised Services and Transition	To keep informed of achievements, plans, issues/challenges and learnings
Senior Advisor, Senior PFC's, Client and or Corporate Legal	To review and seek direction on issues of legal or regulatory risk
Financial Administration Division	To oversee and assist with the management of the legal and financial affairs of represented persons. To ensure assets are secured and full entitlements of income is received. To inform of emerging issues and client referrals. To ensure quality service delivery

Contact / organisation	Purpose of communication
Internal Service Providers	To manage service level agreements for specialist advice (tax, financial planning, legal) or support services necessary to meet the specific needs in managing clients' financial and legal affairs
<b>External</b>	
VCAT	To seek direction and/or approval for decisions that fall outside of State Trustees' authority when it relates to managing clients' affairs
Office of the Public Advocate (OPA)	To liaise with OPA guardians appointed under the <i>Guardianship and Administration Act</i> to ensure lifestyle decisions are made in accordance with clients' financial circumstances.
External Support Services (e.g. case managers, social workers)	To liaise with these services to support clients' financial needs and to assist to determine clients' will and preference

### Knowledge, skill and experience requirements

#### Essential:

- Tertiary qualification in Human Services, Social Services, Business or equivalent experience
- Experience managing and leading high-performance teams
- Experience working in service environments that require a high degree of problem solving and professional collaboration
- Experience in the human services field and in coordinating tailored services to meet client needs
- Understanding and experience working with vulnerable people, ie, those with disability, mental illness, at risk of financial abuse, homelessness etc and in coordinating services to meet the client needs.
- Experience in personal financial administration and or the ability to work under legislative requirements, with intermediate financial analytical skills
- Ability to make decisions whilst showing empathy and compassion
- Active listening skills & well-developed professional communication skills (written and spoken)
- Excellent stakeholder engagement skills
- Passionate about making a difference to the lives of Victoria's most vulnerable people
- Ability to have difficult conversations whilst being sensitive to client needs
- Demonstrated ability to prepare commercial standard correspondence, reports and recommendations

#### Desirable:

- Post graduate studies in in Human Services, Social Services or equivalent
- Diploma in financial counselling
- Previous experience working in government departments such as Department of Health and Human Services
- Experience with mental health first aid, and/or crisis counselling
- Experience managing budgets and/or being responsible for finances
- Knowledge of relevant legislation, particularly the Trustees Act 1958, Guardianship and Administration Act 1986 , Guardianship and Administration Act 2019 and State Trustees (State Owned Company) Act 1994

Key Competencies

<b>Client focus:</b> Manage client relationships and experience
<b>Lead and manage:</b> Lead and manage a team
<b>Problem solving and decision making:</b> Make and support team-based decisions
<b>Cross-functional awareness and teamwork:</b> Develop team behaviours and organisational awareness
<b>Developing self and others:</b> Actively develop self and team members
<b>Listening and communicating:</b> Promote and demonstrate open communication within and across teams
<b>Results orientation/execution:</b> Maintain focus on team results