

Position Description

Role:	NDIS Consultant
Business Unit:	Financial Administration
Classification:	Career Level 2
Location:	Footscray
Reporting to:	Team Leader, NDIS
Direct Reports:	None

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.

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.

The impact you'll have....

State Trustees sees an opportunity to assist National Disability Insurance Scheme (NDIS) participants to realise their full potential through independence, social and economic participation.

As a NDIS Consultant, you will assist our clients with their NDIS needs by ensuring State Trustees has a current copy of their NDIS plan on file. You will also ensure the correct invoices and payments are referred to the NDIS and refer clients who may need assistance accessing the NDIS or requiring a review of their existing NDIS plan.

You will help clients who are socially disadvantaged and meet the NDIS eligibility criteria to access the necessary supports through NDIS.

You will work in partnership with key stakeholders, non-government service providers and advocacy groups to deliver client and business outcomes.

Accountabilities

Accountability	Key activities to deliver on accountability
Supports strategic direction	<ul style="list-style-type: none"> Understands and supports the organisation's vision, mission, and business objectives.
Stakeholder engagement	<ul style="list-style-type: none"> Builds and maintains strong relationships with all key internal and external stakeholders to provide information and advice regarding State Trustees and the NDIS. Liaises and advocates on client's behalf with key stakeholders such as NDIS, VCAT and OPA Links clients to advocacy services for planning support where required
Information Management	<ul style="list-style-type: none"> Records all events and communications with clients, family members and stakeholders in the appropriate systems. Registers NDIS plans and Administration Orders within internal databases. Provides clients with information on their NDIS plan and financial affairs.
Identification and enrolment of NDIS clients	<ul style="list-style-type: none"> Communicates with clients and their supports about the NDIS and their eligibility. Assists clients to locate their birth certificate, Centrelink Customer Reference Number (CRN) and medical documentation to submit to NDIS. Measuring client's experiences through the NDIS enrolment process
Reporting and quality assurance	<ul style="list-style-type: none"> Acts professionally and takes responsibility for work, including contributing to reporting to ensure targets and deadlines are met. Monitors own work to ensure compliance with the required service levels are met. Monitors own work to ensure consistency with legislation, policies, work instructions and service standards.
Communicates with influence	<ul style="list-style-type: none"> Presents messages in a concise and articulate manner, seeking to understand the relevant audience and tailoring communication style accordingly. Explains procedures and operational policies to individual clients or colleagues.

Decision making

Decisions made independently by this position:	<ul style="list-style-type: none"> Making recommendations regarding responding to situations of complexity/risk Making recommendations for deviations to service standards Responding to matters in line with levels authorised by the State Trustees Client Authorities Policy and Corporate Delegation of Authority
Decisions made after consultation with supervisor:	<ul style="list-style-type: none"> Recommendations for addressing identified resourcing needs Trialling amendments to administration processes Departing from usual business processes to account for unusual complexity/risk

Decisions referred to supervisor:	<ul style="list-style-type: none"> • Responding to matters beyond the State Trustees Client Authorities Policy and Corporate Delegation of Authority • Permanent amendments to processes • Engagement of legal or other services in relation to complexity/risk
-----------------------------------	--

Key communications

Contact / organisation	Purpose of communication
Internal	
Team Leader, NDIS Transition team	To proactively keep informed of achievements, plans, issues/challenges and learnings
Internal Service Providers	To manage service level agreements and impact on business as usual work
External	
Clients, external agencies and advocacy services	To manage concerns regarding the administration of person's estate and/or information gathering including identification documentation

Knowledge, skills and experience requirements

Essential:

- Demonstrated experience in a customer service and business administration role.
- Strong knowledge and understanding of the disability sector including the needs, rights and issues of people with disability.
- Well-developed and adaptable communication skills (written and spoken), including the ability to deal sensitively with clients with a disability.
- Basic computer literacy including competent use of Microsoft Office.
- Willingness to travel.

Desired:

- Ability to understand, interpret and apply the legislative provisions of the *National Disability Insurance Scheme (2013)*, *Guardianship and Administration Act 2019*, or any other legislative provisions related to the business function of the Trustee, or the ability to rapidly acquire these skills.
- Background knowledge of financial services and/or trustee industries.

Key Competencies

Problem solving and decision making: Solve problems and make decisions with minimal guidance
Client focus: Add immediate value to clients and stakeholders
Listening and communicating: Promote and demonstrate open communication with clients and within teams
Time management: Plan and organise time outside established priorities
Building and maintaining relationships: Develop and nurture key internal and external contacts