



# Position Description

## Outreach Financial Counsellor

Community and Family Care  
July 2020

### Agreement

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Signed – Manager

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Signed – Employee

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Date

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Date

**Do all the good you can**  
because every life matters



# Financial Counsellor

## 1. Overview of Wesley Mission

Wesley Community Services Limited, a company limited by guarantee pursuant to the Corporations Act 2001, is a Public Benevolent Institution operating as Wesley Mission to deliver services and programs to provide direct relief of poverty, sickness, suffering, distress, adversity, disability, destitution, and helplessness in New South Wales and other parts of Australia as inspired by the work of Jesus Christ in word and deed. Our vision is to:

“Do all the good you can, by all the means you can, in all the ways you can, in all the places you can, at all the times you can, to all the people you can, as long as ever you can”.

Out of Christian love and compassion we are driven by Christlike servanthood, unfailing integrity and courageous commitment.

The organisational plan is based on four key result areas, namely:

- our clients
- our people
- our operations
- our financials

Our position descriptions and performance plans are aligned with these four key result areas.

## 2. Overview of Community and Family Care

Wesley Mission’s Community and Family Care teams build resilience and strengthen capacity in the local communities where we work. We will provide front line care to people (within NSW) who seek our services on voluntary basis. We will support people using trauma-informed person-centred approaches in a holistic manner. We will actively seek to “Do All the Good We Can, By All the Means We Can, In All the Ways We Can,” for the whole of community. We are committed to local communities, the traditional owners, the new arrivals, the local people and Wesley’s meaningful presence within the local space. We are committed to finding ways to support and address the local un-met need. We will identify and respond to hidden and emerging needs in our local communities.

The main areas in Community and Family Care are:

- Brighter Futures
- Family Centres
- Targeted Earlier Intervention
- Multicultural Programs
- Worksmart
- Youth Health
- Young Healthy Minds
- Youth Hope
- Financial and Gambling Services
- Emergency Relief
- Specialist Homelessness Services
- Mums and Kids Matter
- Getting it Together
- Assistance with Care and Housing
- ParentsNext
- Executive Management team



### 3. Overview of role

Wesley Financial Counselling is a free, face-to-face, confidential counselling for individuals and families experiencing personal financial difficulties and crisis.

Our program provides comprehensive, specialist counselling support in order to address the immediate distress caused by financial hardship and enable our clients to build longer- term capability to budget and manage their money better and make informed financial decisions in the future.

Our service is designed to empower and includes, counselling, assessing, educating, informing, providing options, negotiating, advocating, mediating, cash flow management options, personal financial management and referral as well as financial education programs.

As an outreach financial Counsellor, you will also be responsible for;

- Providing one on one financial counselling support focused on bushfire impacted communities
- Delivering financial literacy group programs to vulnerable communities
- Providing flexible engagement options for disadvantaged clients, this includes home and community visits
- Provide EAPA and WDO's
- imbedding service provision within highly disadvantaged communities to reduce barriers of access.
- Making real and sustainable changes to vulnerable communities
- mentoring, supervising and encouraging the learning and development of our interns and students

This position works in accordance with SCHADS 5 characteristics (attachment A)

### 4. Relationships

Reports to: Team Leader, financial counselling

### 5. Major role responsibilities

#### 5.1 Our clients

- ensure every interaction with clients and potential clients is underpinned by the principles of unconditional positive regard
- ensure support provided is person centred and culturally appropriate
- support and empower those who are experiencing financial difficulties to develop short term crisis management solutions and assist to develop long term prevention strategies.
- provide flexible and easy access to face to face support – home visits, community engagement
- provide EAPA and WDO support to eligible clients
- Develop strong connections to vulnerable communities in order to increase awareness and individual capacity in order to reduce entrenched community disadvantage
- develop individual and tailored action plan in collaboration with client.  
provide all clients with information, analysis of options, and referrals to appropriate wrap round support
- provide advocacy on behalf of clients with creditors
- empower clients to be a part of the process and allocate manageable tasks
- provide education and advice on options



- encourage the development of financial management skills such as budgeting and personal cash flow management
- maintain an active caseload, the number of new clients and on-going clients to be decided in consultation with supervisor
- provide financial literacy programs to consumer groups in the community, this will involve delivery of Wesley Missions developed 'In Charge of my Money' program
- promote the 'In Charge of my Money' financial literacy education program in the community
- open and maintain up-to-date files in accordance with Wesley Counselling Service practice standards

#### 5.1.1 Performance Measures

- 90% client report satisfaction in service
- 85% clients achieve improvement in at least one area of personal wellbeing
- Number of community visits including home visits conducted
- Funding and personal KPI's achieved
- Evidence proactive engagement vulnerable communities
- evidence of quality partnerships and increased cross referrals across sector
- evidence of quality partnerships and increased cross referrals within Wesley Mission

## 5.2 Our people

- be a part of creating a team culture of support and respect
- Adhere and promote Wesley Mission's vision and values
- Provide high level of peer support and mentoring to allocated interns and students
- complete Wesley Mission induction and orientation program and mandatory training
- attend and participate in regular support meetings and team meetings
- attend and participate in annual Employee Contribution & Development process
  - continue tracking achievement of goals, documenting your progress on the Employee Contribution & Development template
- commit to a continuing process of personal self-development, training and skills acquisition
- maintain current RGF membership
- work with leadership team to develop, implement, maintain and consistently review an evidence informed practice model
- ensure all policies and procedures are understood and adhered to, seeking clarity with supervisor as required
- attend Life of the Mission events as advised by supervisor – there is an expectation that all staff will attend Wesley's Thanksgiving Service on the first Sunday in December
- be a part of creating a team culture of support and respect
- promote and ensure adherence to Wesley Mission brand
- ensure all Human Resource (HR) policies and procedures are understood and adhered to
- regularly report to your supervisor on team issues such as resourcing needs, performance, training/development, disciplinary action, leave, Work, Health & Safety issues etc
- identify and recommend opportunities to increase team satisfaction
- attend all scheduled meetings

#### 5.2.1 Performance Measures

- successfully achieved induction and orientation and mandatory training
- successfully complete all training identified in your ECD
- attendance at Wesley Thanksgiving Service and other Life of the Mission events



- evidence of compliance with new practices, policies and procedures
- 90% attendance at team meetings and case conferences
- 95% attendance monthly line support meetings, including probation meetings
- Evidence of daily debriefs with assigned intern / student
- Participation in 360 annual review process

### **5.3 Our operations**

- ensure the reputation and integrity of Wesley Mission is maintained at all time
- actively promote our service within local communities
- actively participate in the development and mentoring of new employees including interns and students
- develop professional relationships with local service providers to encourage referral pathways
- contribute to program performance monitoring through reporting systems leading to measurable accountability as required funding bodies
- advocate and communicate the Wesley Mission brand and key messaging strategy to stakeholders, ensuring brand compliance and use of correct templates
- contribute to reviewing internal systems including policies and procedures to ensure more efficient and effective methods of delivery and to ensure continual improvement
- contribute to evaluation and quality improvement of programs
- as an employee, be responsible under the Work Health & Safety Act for the health and safety of all persons you come into contact with, during employment. Perform WHS tasks as directed by supervisor
- embrace new developments and technological innovations including CRM and Carelink+, relevant to Wesley Mission's work
- maintain industry specific standards and ISO9000 standards as per Wesley Mission's quality assurance policies
- promote the grievance procedure to all clients and respond in line with the Wesley Mission Grievance Procedure.

#### **5.3.1 Performance Measures**

- regular reporting requirements are met
- % increase in the number of referrals received from other organisations
- Number of local network/interagency meetings attended
- achieved working knowledge of:
  - funding specifications and guidelines
  - Wesley Mission employee handbook
  - relevant policy and procedures

### **5.4 Our financials**

- Wesley resources are maintained and serviced as required
- Monthly expenditure remains within budget
- commitment to retaining current funding through working within funding guidelines and providing a best practice service

#### **5.4.1 Performance Measures**

- allocated Wesley resources and equipment are well maintained
- ensure annual registration is paid no later than 29 June each year



- If in possession of corporate credit card, ensure monthly reconciliation is completed by 15<sup>th</sup> each month

## 6. Professional responsibilities

- other activities to support the delivery of the Wesley Community and Family Care Business Plan and Wesley Mission Strategic Plan, as requested by your manager
- as an employee, be responsible under the Work Health & Safety Act for the health and safety of all persons they come into contact with, during employment. All hazards and injuries must be reported through the normal process as set out in Wesley Mission's Work Health, Safety and Rehabilitation Quality Management System and site procedures
- in relation to Wesley Mission and the Uniting Church in Australia, attend such functions, meetings, seminars, training courses as directed by your supervisor
- in relation to Wesley Mission attend worship services as encouraged by your supervisor
- take responsibility for personal career development and training
- participate in Wesley Mission's Orientation program, so as to gain an understanding of, and promote, the application of the EEO, Affirmative Action, Privacy Act, Work Health & Safety Act and other relevant legislation
- administer Wesley Mission's philosophy of care and other relevant policy documents as appropriate
- demonstrate responsible stewardship of all resources, and willingness to report impropriety in keeping with the values of Wesley Mission
- ensure the reputation and integrity of Wesley Mission is maintained at all times
- Ensure all data collection and reporting is timely and in line with funding body and organisational requirements
- Practices within the guidelines described in Code of Conduct and Ethics and other Statutory requirements
- Demonstrates an understanding and strict compliance with the protocols, policies and procedures concerning privacy, dignity and confidentiality



## 7. Selection criteria

To be successful in this position, candidates must possess the following:

### Demonstrated behaviours

- willingness to affirm Wesley Mission's vision, mission and values and enthusiastically advocate our Word and deed ministry
- demonstrated ability to work unsupervised as well as an effective team player with a positive can-do attitude
- relates well to a range of people with sound listening and problem-solving skills
- displays unconditional positive regard during all workplace interactions
- confident professional attitude with strong initiative
- displays emotional maturity and resilience
- passion for supporting vulnerable and in need individuals
- dedication to developing strong relationships with local community
- willingness to learn and accept feedback

### Essential skills/knowledge Desirable criteria

- Hold a diploma Financial counselling
- Min 3 years industry experience as a financial counsellor
- accredited member of the Financial Counsellors Association of NSW (or working towards)
- FCAN recognised peer supervisor
- experience and/or competency in delivering community education programs
- experience in telephone assessment and counselling skills
- computer literacy
- excellent time management, multi-tasking and follow-up skills
- excellent verbal and written communication skills
- understanding the importance of family/ community eco systems
- high level of cultural competency
- understanding of strength-based practices
- current NSW driver's license
- current working with children's check



### Desirable criteria

- welfare industry experience
- an interest in and/or knowledge of problem gambling issues
- sound background and training in general counselling
- experience in trauma counselling

### Attachment A

## Social and community services employee level 5

### Characteristics of the level

- A person employed as a Social and community services employee level 5 will work under general direction from senior employees. Employees undertake a range of functions requiring the application of a high level of knowledge and skills to achieve results in line with the organisation's goals.
- Employees adhere to established work practices. However, they may be required to exercise initiative and judgment where practices and direction are not clearly defined.
- General features at this level indicate involvement in establishing organisation programs and procedures. Positions will include a range of work functions and
- may involve supervision. Work may span more than one discipline. In addition, employees at this level may be required to assist in the preparation of, or prepare the organisation's budget. Employees at this level will be required to provide expert advice to employees classified at a lower level and volunteers.
- Positions at this level demand the application of knowledge which is gained through qualifications and/or previous experience. In addition, employees will be required to set priorities and monitor work flows in their area of responsibility which may include establishing work programs in small organisations.
- Employees are required to set priorities, plan and organise their own work and that of lower classified staff and/or volunteers and establish the most appropriate operational methods for the organisation. In addition, interpersonal skills are required to gain the co-operation of clients and staff.
- Employees responsible for projects and/or functions will be required to establish outcomes to achieve organisation goals. Specialists may be required to provide multi-disciplinary advice.

### Responsibilities

To contribute to the operational objectives of the work area, a position at this level may include some of the following:

- responsibility for a range of functions within the organisation requiring a high level of knowledge and skills;
- undertake responsibility for a moderately complex project, including planning, co-ordination, implementation and administration;
- undertake a minor phase of a broader or more complex professional assignment;
- assist with the preparation of or prepare organisation or program budgets in liaison with management;
- set priorities and monitor work flow in the areas of responsibility;
- provide expert advice to employees classified at lower levels and/or volunteers;
- exercise judgment and initiative where procedures are not clearly defined;
- understanding of all areas of computer operation to enable the provision of advice and assistance when non-standard procedures/processes are required;





- monitor and interpret legislation, regulations and other agreements relating to occupational health and safety, workers compensation and rehabilitation;
- undertake analysis/design for the development and maintenance of projects and/or undertake programming in specialist areas. May exercise responsibility for a specialised area of computing operation
- undertake publicity assignments within the framework of the organisation's publicity and promotions program. Such assignments would be of limited scope and complexity but would involve the co-ordination of facets of the total program including media liaison, design and layout of publications/displays and editing;
- operate as a specialist employee in the relevant discipline where decisions made and taken rest with the employee with no reference to a senior employee;
- undertake duties that require knowledge of procedures, guidelines and/or statutory requirements relevant to the organisation;
- plan, co-ordinate, implement and administer the activities and policies including preparation of budget;
- develop, plan and supervise the implementation of educational and/or developmental programs for clients;
- plan, co-ordinate and administer the operation of a multi-functional service including financial management and reporting;
- where the prime responsibility lies in professional services, employees at this level would undertake at least some of the following:
  - under general direction undertake a variety of tasks of a specialised and/or detailed nature;
  - exercise professional judgment within prescribed areas;
  - carry out planning, studies or research for particular projects including aspects of design, formulation of policy, implementation of procedures and presentation;
  - provide reports on progress of program activities including recommendations;
  - exercise a high level of interpersonal skills in dealing with the public and other organisations;
  - plan, develop and operate a community service organisation of a moderately complex nature.

### Requirements of the position

Some or all of the following are needed to perform work at this level:

#### Skills, knowledge, experience, qualifications and/or training

- knowledge of organisational programs, policies and activities;
- sound discipline knowledge gained through experience;
- knowledge of the role of the organisation, its structure and services.

#### Prerequisites

- relevant degree with relevant experience;
- associate diploma with substantial experience;
- qualifications in more than one discipline;
- less formal qualifications with specialised skills sufficient to perform at this level; or
- attained through previous appointments, service and/or study an equivalent level of experience and expertise to undertake the range of activities required.

#### Organisational relationships

- work under general direction;
- supervise other employees and/or volunteers.

#### Extent of authority

- exercise a degree of autonomy;
- control projects and/or programs;
- set outcomes for lower classified staff;
- establish priorities and monitor work flow in areas of responsibility;



- solutions to problems can generally be found in documented techniques, precedents and guidelines or instructions. Assistance is available when required.