



metro assist

POSITION DESCRIPTION

Graduate Financial Counsellor

Employment Status	35 Hours per week
Industry Award	SCHADS Level 4
Reporting to	Family and Financial Inclusion Manager
Directly Supervising	Student placements
Work Area	Inner West, Inner South West and South West Sydney
Office Location	Campsie and as required at other offices and outreach locations
Conditions	Employment for this position is subject to an “up to date” Covid-19 vaccination status, a satisfactory Working with Children and National Police check

Position Summary

The Inner Western Sydney Financial Counselling Service provides information and counselling to clients experiencing difficulties with their financial commitments. The primary function of the Service is the delivery of a face to face and virtual counselling service and casework to clients who reside within the identified catchment area.

The Graduate Financial Counsellor will provide information, options, support and advocacy for individuals, families and groups of consumers to explore, develop and implement strategies for redressing credit issues. The Graduate Financial Counsellor will act without conflict of interest, to negotiate and advocate on behalf of people who are at financial risk. During the counselling process, the Graduate Financial Counsellor will be able to educate and pass on skills to consumers as to their rights and responsibilities when using credit and other marketplace services and empower the consumer through this knowledge.

KEY RESPONSIBILITY AREAS

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<p><i>Vision, Mission, Values</i></p>	<ul style="list-style-type: none"> • Working knowledge of the Metro Assist’s Vision, Mission, Values, client requirements and the community context. • Has a general knowledge of administrative functions within the organisation; and of network services, and referral agencies. • Has a working knowledge of the functions of other projects within the Family and Financial Inclusion Team. 	<ul style="list-style-type: none"> • Understands and articulates significance of Centre’s Vision, Mission and Values; and follow organisational values in day-to-day work. • Understands and articulates the significance of the FC/EAPA/ER/NILS programs within the financial inclusion team. • Make effective contact across Metro Assist sites for program information and collection and dissemination. • Feedback from client surveys and stakeholders is positive. • Adheres to identified targets in program work plans KPI’s and funding agreement KPI’s 	<p>N/A</p>
<p><i>Leadership / Teamwork</i></p>	<ul style="list-style-type: none"> • Able to independently monitor and amend their own schedule in response to their workload demands; and in response to team workload demands while escalates issues as appropriate. • Shows by example a high level of motivation and sustained discipline to provide effective service to clients. • Participates in providing solutions to problems associated with specific areas of responsibility. • Works collaboratively within the Inner Western Sydney Financial Counselling Service, and Family and Financial Inclusion Team. • Has knowledge of conflict resolution as a tool within the work environment. • Establish and maintain positive working relationships with colleague that are fair, professional, supportive and respectful. 	<ul style="list-style-type: none"> • Can support and mentor student placement within the FC program. • Adheres to timeframes identified in workplans and targeted KPI’s. • Provides on-the-job coaching to students and volunteers. • Feedback from team members and supervisor • Demonstrates initiative and participates in team problem-solving. • Adopts a collegiate approach to complex cases and work management. • Participates in case conference to contribute to discussion towards collaboration, problem solving, issues and needs addressed towards successful outcomes for the clients. • Advocates effectively on issues impacting and presented by the clients with guidance by FFIS Manager. 	<p>N/A</p>

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<p><i>Interpersonal Skills / Communication</i></p>	<ul style="list-style-type: none"> • Able to resolve conflict with assistance and report back as required. • Able to apply cultural awareness when working with CALD and Aboriginal Torres strait islander using a holistic approach. • Uses positive engaging techniques when dealing with clients, staff, partners and external organisations. • Has effective listening skills and seeks, provides and/or shares information in an appropriate and respectful manner. • Deals with emerging crises as appropriate and seeks more experienced support where necessary. 	<ul style="list-style-type: none"> • Communicates effectively and in a timely manner with partners, clients, stakeholders, and respects confidentiality. • Is aware of organisational protocols in relation to the Financial Counselling Program communication and conflict resolution, and followed when required. • Is able to show empathy and use assertive and listening skills when dealing with clients and staff. • Effectively uses systems of the Financial Counselling Network to engage in and initiate discussions relevant to financial issues. • Feedback from internal and external stakeholders. 	<p>N/A</p>
<p><i>Continuous Improvement / Quality</i></p>	<ul style="list-style-type: none"> • Suggests changes to improve quality in own work area and makes agreed changes. • Has an understanding of the elements of continuous improvement in relation to provision of financial counselling; including why the process is undertaken; how information and data is gathered and assessed; and how continuous improvement is applied. • Identifies opportunities for improvement and suggests amendments to documentation/processes. • Participates and contributes to the development of innovative approaches to client service delivery. • Identifies problems in relation to client service delivery and able to identify the consequences in relation to service delivery, and seek appropriate assistance. 	<ul style="list-style-type: none"> • Contributes to discussions around administrative practices and trends. • Attends training and workshops and keeps work knowledge up to date. • Actively participates within the financial and family team meetings, case conference; and participates as required within the financial counselling sector. • Identifies and recommends changes to procedures, protocols and work systems, both internally and across relevant external services. • Participates in service reviews, development and planning functions. • Contributes to discussions around program knowledge, trends and best-practices. • Contributes to discussions around program knowledge, trends and best-practices. • Adapts readily and positively to changes in procedures, protocols and work systems. 	<p>N/A</p>

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<i>Practices / Safety / Standards</i>	<ul style="list-style-type: none"> • Adheres to Metro Assist Policies and procedures, service delivery standards, staff code of conduct, and all relevant government legislation (eg, WH&S) and relevant standards. • Complies with Metro Assist information security policy, standards, plan and procedures relevant to program area. • Ensures the security and protection of information assets under the custody. • Adhere to Financial inclusion program (FC/ ER/ EAPA/ NILS) guidelines and recommended work practices and seek assistance when required. • Has an understanding of the Service's standards in relation to client representation and conflict of interest. 	<ul style="list-style-type: none"> • Is conversant with organisational policies and procedures, codes of conduct and relevant legislation and safe work practices and applies the polices effectively in own practice. • Attendance to security awareness training and prompt follow up on ISM improvement instructions. • Reports and responds to any suspected or actual security breaches. • Applies understanding of organisation's policies and procedure, code of ethics and safe work practices. • Has an appropriate clearance under working with children requirements and National Police check. 	N/A

Functional Requirements

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<i>Client Intake/ Casework</i>	<ul style="list-style-type: none"> • Assist people to overcome debt problems through personal empowerment and, if necessary, direct negotiations, mediation or advocacy on their behalf • Complete all administrative tasks including follow up, correspondence and intake process as required, including responding to client intake within 5 business days. • Undertakes service delivery liaison/ communication with clients in respect to a variety of complex problem resolutions involving multiple service delivery methods. • Provide general information about the service to the clients and external stakeholders • Understands that services are delivered to clients in accordance with client-focus principles. • Understands that part of the role of the Financial inclusion worker is to provide financial information to clients, and identify those matters that can be resolved immediately through financial capability or require financial counselling; or referral to other services. • Assists the Service to maintain a list of alternate service providers, including legal, emergency accommodation and community welfare. • Ensures clients have access to the Service's and Centre's complaint processes. 	<ul style="list-style-type: none"> • Negotiate case management arrangements in relation to clients within the agency and with relevant agencies in the service sector. • Provides a high quality service that meets the standards set down by FCAN. • Meets with an average of new three clients per day to achieve KPI target. • Willingness to provide services as directed including EAPA and Relief assistance to compliment and support client within financial counselling • Respond to all enquires within a timely manner. All intake/ booking need to be allocated for an appointment within 5 business days. • Record all incoming enquiries accurately and in a timely manner onto CDS and any other reports as required. • Has a working knowledge of complex clients needs and utilises appropriate tools and protocols to assist in delivery of services such as TIS, TTY and disability support arrangements. • Case management protocols, guidelines and follow-up are understood and enacted. • Adheres to relevant policies; codes of conduct and ethics and guidelines relating to clients consent, and authorities to act; and clients understand the information provided and action to be taken in relation to creditors, or complaints to bodies such as the NSW Ombudsman. • Makes appropriate judgement on client intake and eligibility and seeks assistance where necessary. 	

KEY RESPONSIBILITY AREAS	ROLE REQUIREMENTS	KEY PERFORMANCE MEASURES	
Data Entry/Records Management	<ul style="list-style-type: none"> • Ensure file records and statistical data on client contacts are accurately recorded in CDS and external portal as required • Adheres to compliance and reporting requirement Including KPI's (open and Closed Clients on CDS), working knowledge for reporting purposes. • Compliance with privacy and information security. • Adheres to compliance and reporting requirements including the daily reporting on CDS and any funding system. • Has a thorough understanding of the need for record keeping and filing systems. 	<ul style="list-style-type: none"> • All file records and data entry is completed in an accurate and timely manner on Client data base system (CDS internal and external). • Ensures compliance with law and internal policies with regard to client data and case information. • Enters client information onto CDS internal reporting on a regular bases and within reporting deadlines. • Maintains files for clients, that include recording of telephone/electronic conversations/messages; and record details and outcomes of face to face appointments and other conversations or correspondent. • Enter clients information on EAPA program as required including entering data onto CDS for internal reporting. 	
Compliance/Reporting	<ul style="list-style-type: none"> • Adheres to compliance and reporting requirements. • Assists with the implementation of new/amended compliance and reporting requirements. • Complies with Metro Assist information security policy, standards, plan and procedures relevant to program area. • Ensures the security and protection of information assets under custody. 	<ul style="list-style-type: none"> • Ensure that all FC and EAPA application are correctly uploaded onto EAPA and CDS. • Provides timely and accurate reports, case notes and data to the Manager. • Meets KPI's set within the role and funding agreement. • Informs the Manager of issues as they arise and/or during supervision sessions. • Is aware of, and able to articulate program and operational changes. • Feedback from staff, Department and other stakeholders. • Attendance at security awareness training and prompt follow up on ISM improvement instructions. • Reports and responds to any suspected or actual security breaches. 	
Experiences/Qualifications/Professional Development	<ul style="list-style-type: none"> • Diploma of Financial Counselling • Maintenance of professional accreditation in accordance within Metro assist Continuing Professional 	<ul style="list-style-type: none"> • Presents qualifications and experience as part of the recruitment process. • Participates in professional development opportunities 	

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	Development in support of FCA Accreditation	in line with Metro Assist policies and procedures, and Financial Counselling program guidelines.	
Special Projects/tasks	<ul style="list-style-type: none"> As and when required by the Manager work on specific projects/events related to the core functions of programs. 	<ul style="list-style-type: none"> Satisfactory completion of project/tasks within defined Scope, specification, time frames and budget. 	

Decision Making Authority

You are responsible for fulfilling your duties within the framework of legislative requirements and Metro Assist Limited policies and procedures. Issues are usually resolved without reference to your immediate supervisor but matters that arise which are outside the policy framework or matters which may potentially escalate to the detriment of Metro Assist Limited should be reported to your immediate supervisor.

Date Prepared/Updated *May 2022*

Approved *Chief Executive Officer*

Acknowledgement

I acknowledge the following:

- I have read and discussed this position description with my manager; and
- I understand the position objectives, key tasks, responsibilities and performance standards.

Employee Name: _____

Employee Signature: _____

Date: _____