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POSITION DESCRIPTION

1 Position Details

Item	Description
Position Title	Financial Inclusion Service Lead
Function / Service	Service Delivery / Financial Inclusion Services
Position Type	Part-Time Fixed Term to 30 June 2027 – 28 hours per week
Classification	SCHADS Grade 7
Reports To	Head of Family & Financial Inclusion Services
Direct Reports	Approx. 4 (Financial Counsellors and NILS Staff)
Office Location	Campsie and all other offices as required
Service Size	Approx. \$0.8M program funding and service delivery portfolio

2 Position Purpose

The Financial Inclusion Service Lead provides end-to-end leadership and responsibility for Financial Inclusion Services, including Financial Counselling, No Interest Loan Scheme (NILS), and Emergency Assistance Payment (EAPA).

The role combines program management, people leadership and senior practitioner responsibilities, and is responsible for the overall performance, quality, compliance and sustainability of the service.

The Financial Inclusion Service Lead holds responsibility for service delivery, funding outcomes, program settings, and stakeholder engagement, and acts as the primary operational lead for the Financial Inclusion service.

The role is responsible for service performance and delivery, contributing to program development and ensuring alignment with funding requirements. The role is also responsible for supporting the management and resolution of service complaints.

As the most senior practitioner in the service, the role maintains a small caseload, leads practice excellence, supervises staff, and ensures the service operates effectively within legislative, funding and organisational frameworks.



3 Key Responsibilities

Responsibility Area	Key Activities
Service Delivery Management Team	<ul style="list-style-type: none"> • Participate as a key member of the Service Delivery Management Team, contributing to shared oversight of service performance, practice quality, integration and service-level risk. • Collaborate with peer leaders to resolve cross-portfolio/program issues and implement agreed service delivery approaches. • Escalate matters that exceed service authority to the Head of Family & Financial Inclusion Services
Program Leadership and Service Design	<ul style="list-style-type: none"> • Contribute to the development and refinement of Financial Inclusion service models, providing operational insight and expertise • Adjust service delivery settings within established program model, including intake, casework mix, outreach and community education • Implement service model changes and improvements as directed by the Head of Family and Financial Inclusion Services • Analyse service demand, client cohorts and emerging financial hardship issues to inform service delivery • Ensure alignment with relevant program guidelines, funding requirements and sector priorities • Drive continuous improvement in service accessibility, responsiveness and impact • Ensure effective coordination and integration across Financial Counselling, NILS and EAPA service streams
Service Delivery and Performance	<ul style="list-style-type: none"> • Be responsible for the delivery of Financial Inclusion Services • Ensure compliance with all funding guidelines, program requirements and contractual obligations (including Department of Social Services, Office of Fair Trading, Good Shepherd and other funding bodies) • Monitor service demand, intake and case complexity and adjust service delivery accordingly • Support delivery of internal or external training, education or capacity-building activities where relevant • Ensure services are responsive to clients with complex needs, including culturally and linguistically diverse communities, low literacy and other vulnerabilities



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Responsibility Area	Key Activities
Service Performance and KPIs	<ul style="list-style-type: none"> • Be responsible for achieving program KPIs across all service components • Monitor, analyse and interpret performance data and trends • Provide performance insights and reporting to internal leadership and funders • Take corrective action where performance risks or gaps are identified
Day-to-Day Team Leadership and Supervision	<ul style="list-style-type: none"> • Provide supervision, coaching and leadership to 4 direct reports • Allocate caseloads across Financial Counselling, NILS and EAPA service streams • Monitor workload, performance and staff wellbeing • Coordinate team operations including intake, outreach and service coverage • Lead end-to-end people management including recruitment, induction and onboarding of staff • Set performance expectations, conduct regular supervision and formal performance reviews • Manage underperformance, disciplinary matters and terminations in line with organisational policy and in consultation with People & Culture • Support ongoing capability development and succession within the team.
Senior Practitioner Casework	<ul style="list-style-type: none"> • Maintain a small caseload of financial hardship and financial counselling matters • Provide high-level advice and support to clients experiencing financial distress • Facilitate case discussions, case reviews or reflective practice to support consistent and high-quality service delivery • Support staff with complex case consultations and escalation • Model high-quality, ethical and client-centred practice
Financial and Program Stewardship	<ul style="list-style-type: none"> • Manage service delivery within the allocated program budget and funding requirements • Align staffing, resources and service delivery with funding conditions • Monitor expenditure, identify financial risks and take corrective action • Ensure sustainability and effective utilisation of resources



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Responsibility Area	Key Activities
Practice Quality, Safeguarding and Risk	<ul style="list-style-type: none"> • Ensure financial counselling practice is consistent with professional and ethical standards (including Financial Counselling Australia and relevant state bodies) • Support staff to maintain professional standards, accreditation requirements and ethical practice • Ensure high standards of practice consistent with financial counselling principles, program guidelines and organisational policies • Maintain oversight of complex, high-risk and escalated matters • Ensure appropriate client consent, confidentiality and record keeping is maintained • Identify, manage and escalate risks and critical incidents
Complaints Management	<ul style="list-style-type: none"> • Lead the management and resolution of client complaints relating to the financial inclusion service • Ensure complaints are handled promptly and in accordance with organisational policy • Monitor complaint trends and identify systemic issues impacting service delivery • Implement improvements to service delivery in response to complaints • Ensure accurate documentation and reporting of complaints
Funding and Sector Engagement	<ul style="list-style-type: none"> • Act as the primary operational contact for funders and program stakeholders. • Contribute to identification of funding opportunities or small-scale program enhancements • Support performance discussions with funders, including interpretation of results and addressing performance issues where required • Interpret funding agreements and ensure the service operates within contractual requirements • Represent the organisation in financial inclusion and community service networks • Identify systemic issues affecting clients and contribute to policy discussions, submissions and advocacy activities • Contribute service insights to support sector advocacy and system improvement



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Responsibility Area	Key Activities
Stakeholder Engagement	<ul style="list-style-type: none">• Build and maintain strong relationships with referral partners and local community services• Represent and advocate for the service and client group in external forums• Identify service gaps and opportunities within the community
Data and Reporting	<ul style="list-style-type: none">• Ensure accurate and timely data entry and case recording systems• Maintain data integrity and ensure compliance with reporting and audit requirements• Monitor quality of case files and documentation, including periodic file reviews or audits• Ensure consistent standards in case recording and data entry across the team



4 Key Relationships

Internal	External
<ul style="list-style-type: none"> • Head of Family and Financial Inclusion Services • Service Delivery leadership • People & Culture • Financial Inclusion team • Students, Volunteers and Placements 	<ul style="list-style-type: none"> • Funders and program contract managers • Financial counselling and hardship support networks • Community organisations and referral partners • Clients and community stakeholders

5 Key Capabilities

- Strong program leadership and service ownership capability
- Expertise in financial counselling, financial hardship or inclusion services
- Ability to lead service delivery in a dynamic demand environment
- Strong supervision, coaching and team leadership skills
- Sound judgement in risk, safeguarding and complex decision-making
- Ability to manage financial, performance and compliance requirements

6 Qualifications and Experience

Essential:

- Relevant tertiary qualification in financial counselling, social work, community services or related field
- Demonstrated experience in financial counselling, financial inclusion or hardship support services
- Demonstrated experience leading teams or programs
- Strong understanding of financial hardship systems, supports and relevant program requirements

Desirable:

- Membership or eligibility for financial counselling accreditation
- Experience managing funded programs or services
- Experience working with culturally diverse communities.

7 Compliance Requirements

- Current Working with Children Check
- Current National Police Check



- Current Driver Licence
- Compliance with organisational policies and procedures
- Complies with Stepwise Community Services information security policies, standards, plans and procedures aligned with ISO 27001 principles, and actively promotes the protection of confidentiality, integrity and availability of organisational information
- Maintains the security, confidentiality and appropriate handling of client and organisational information assets.
- Participates in required security awareness training and implements information management practices appropriately.
- Identifies and reports suspected or actual information security or safety incidents in accordance with organisational protocols.

8 Organisational Commitments

The organisation is committed to child-safe practice, cultural safety and inclusive service delivery. Employees are expected to uphold the organisation's values, comply with relevant legislation and contribute to a respectful and safe workplace.

Leaders are expected to actively demonstrate these commitments by living the organisation's values, leading by example, and embedding safe, inclusive and culturally responsive practices within their teams and areas of responsibility.

9 Decision Making and Accountability

The Financial Inclusion Service Lead exercises delegated authority over service delivery, staffing, workflow and day-to-day program management within approved parameters.

The role is responsible for financial inclusion service performance, funding compliance and service outcomes.

Matters involving significant financial risk, contractual change or broader strategic implications are escalated to the Head of Family and Financial Inclusion Services.

10 Acknowledgement

This Position Description outlines the general purpose, responsibilities, and expectations of the role as at the date of issue. It is intended to provide guidance on the scope and requirements of the position.



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This Position Description may be reviewed and updated from time to time to reflect organisational, operational, or service delivery needs. Reasonable consultation will occur where changes materially impact the role.

By signing below, the employee acknowledges that they have read, understood, and discussed the expectations of the position with their manager.

Name	Signature	Date
Employee		
Manager		



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