



Position Description

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| Position: | Client Liaison Officer |
| Reports to: | Chief Executive Officer |
| Employment type: | Part-time |

Role Summary

Bendigo Legacy is a not-for-profit ex-service organisation, part of a network of autonomous Legacy Clubs throughout Australia and one club in London under the umbrella of Legacy Australia.

Legacy's Mission

To serve the families of deceased and incapacitated veterans, striving to ensure that they face no undue financial or social disadvantage due to their loss.

Legacy's Values

Personal Service, Empathy, Understanding, and Commitment.

What Legacy Does

Legacy provides the essential financial, material, social, educational, developmental and advocacy support that families depend upon each day.

Legacy's People

Legacy is operated by volunteers known as Legatees, and three part-time paid staff. They all work collaboratively, united by our shared values in the delivery of support for veterans' families.

Key Result Areas

The Client Liaison Officer works as part of the Bendigo Legacy team, reporting to the Chief Executive Officer.

Client Support and Assistance: You will

- Provide initial enrolment and eligibility assessment of new clients
- Provide information and advice to support existing clients
- Provide financial assistance for clients in hardship through Education grants, welfare grants, energy subsidies, grocery and food vouchers and cab charges by following Bendigo Legacy's processes for approval and release of funding.
- Understand our referral partners and pathways and facilitate effective referral coordination as appropriate. This includes researching, developing and maintaining relationships with key stakeholders in the community who can assist our clients.
- Assist and advise Legatees in their role to support clients where required.
- Keep detailed and relevant case notes on clients' files that are clear, concise, and updated in a timely manner after each interaction.



Welfare Committee: You will

- Support the Welfare Committee in developing policies and programs to ensure Bendigo Legacy delivers its mission.

Administration Duties: You will

- Attend and participate in General, Board and Welfare Committee meetings and represent Bendigo Legacy at various external and internal forums as required.
- Be an active and supportive member of the office team.

Professional Development: You will

- Stay current in areas of relevant subject matter knowledge.
- Maintain current knowledge of organisational policies and procedures.

Key Selection Criteria

- Experience with Case Management and the ability to manage a caseload of diverse clients.
- Demonstrated ability to exercise sound judgement and decision making. Possess high level planning and time management skills.
- Ability to maintain confidentiality in all dealings with clients, Legatees, and internal and external stakeholders.
- Experience working autonomously and as a member of an effective team, including networking with a wide range of Government departments, non-Government organisations and ex-service organisations.
- Ability to work in a manner that promotes a safe and supportive work environment which respects the dignity, rights and choices of all clients, Legatees, peers, and other professionals.
- Demonstrated ability to effectively monitor funding approval and tracking expenditure.
- Effective verbal and written communication skills, suitable for a range of stakeholders and situations.
- Ability to comply with organisational policies, procedures, Government legislation and codes of conduct.
- Proficient in the use of the Microsoft Office package.

Other Relevant Information

- You will be required to undergo a National Police Check and a Working with Children Check.
- All employees are required to carry out their duties in a manner that does not adversely affect their own health and safety and that of others by reporting all incidents and injuries as well as co-operating with any measures introduced into the workplace to improve Occupational Health and Safety.
- This position description operates in conjunction with and forms part of the relevant individual performance development review plan. An initial review will take place three months following commencement of employment and then on an annual basis.

Position description will be updated as required to reflect changing business needs