



POSITION DESCRIPTION

Casual Financial Counsellor

Employment Status	Casual
Industry Award	SCHCADS Award 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 counselling service and casework to clients who reside within the identified catchment area. This service is supplemented by limited telephone information, representation to a range of relevant authorities such as the Financial Ombudsman and delivery of communication and educational workshops.

All employees must have or be willing to obtain accreditation with FCAN, meet and undertake professional development requirements of FCAN and remained informed of any policy, legislative or service changes relevant to the provision of financial counselling.

KEY RESPONSIBILITY AREAS

CORE RESPONSIBILITIES	ROLE REQUIREMENTS	KEY PERFORMANCE INDICATORS (KPI)	WEIGHTING
Vision, Mission and Values	<ul style="list-style-type: none"> • Has a comprehensive knowledge of the vision, mission and values; and its application within the community context. • Commitment to work within the ethos, mission and values of the organisations. • Has a comprehensive knowledge of the Services' values, ethos and strategic/work plan. • Detailed working knowledge of other relevant teams and other functions within the organisations. • Detailed working knowledge of the partnership, with a strong commitment to that partnership in service delivery outcomes. 	<ul style="list-style-type: none"> - Understands and articulates significance of the Services' Vision, Mission and Values. - Understands, articulates and applies the Services' values, ethos and strategic plan to client services; when representing clients or the Services in dispute resolution fora and in external agencies such as FCAN, and Consumer Credit Legal Centre. - Makes effective referrals to others areas and programs. - Feedback from client surveys and stakeholders. - Adheres to identified targets in program work plans KPI's and funding agreement KPI's 	Not applicable
Practices / Safety / Standards	<ul style="list-style-type: none"> • Adheres to Policies and Procedures, Code of Conduct and all relevant government legislation (eg: WH&S) and relevant standards. Adopts a professional approach to practice including: client representation, financial reporting. • Adheres to the Services' policies and standards, and Financial Counselling program guidelines. • Complies with Metro Assist information 	<ul style="list-style-type: none"> - Is conversant with the Services' procedures, Codes of Conduct and relevant legislation and safe work practices. - Can effectively apply the Services' policies and procedures in relation to safety and standards in all workplaces and outreach workplaces located in external agencies. - Participates in risk assessments and WHS training and activities. - Effectively applies program guidelines and 	

	<p>security policy, standards, plan and procedures relevant to program area.</p> <ul style="list-style-type: none"> • Ensures the security and protection of information assets under the custody. • Has an understanding of the Services' standards in relation to client representation and conflict of interest. 	<p>work practices.</p> <ul style="list-style-type: none"> - Applies understanding of organisations policies and procedure, code of ethics and safe work practices. - Feedback from clients and stakeholders. - Attendance to security awareness training and prompt follow up on ISM improvement instructions. - Reports and responds to any suspected or actual security breaches. 	
Leadership/Teamwork	<ul style="list-style-type: none"> • Able to work with minimal supervision and escalates issues as appropriate. • Works collaboratively within the inner west Sydney Financial counselling services and Family and Financial inclusion team. • Able to independently monitor and amend their own schedule in response to their workload demands; and in response to team workload demands. • Demonstrates to other team members a high level of motivation and sustained discipline to provide a high level care and/or support for clients with a variety of complex requirements. • Understands the techniques of conflict resolution within the work environment. • Shows flexibility within the team so as duties are carried out in consistently and in accordance with the partnership model. 	<ul style="list-style-type: none"> - Can supervised volunteers and students as required - Actively participates in financial counselling team meetings and staff meetings and brings to the attention of the team legal and casework issues relevant to financial matters. - Adheres to KPI's timeframes identified in workplans. - Initiative and participates in the development of Service submissions/responses to financial issues and working parties. - Feedback from team members and supervisor. - Demonstrates initiative and participates in team problem-solving. - Adopts a collegiate approach to complex cases and work management. 	

<p>Continuous Improvement</p>	<ul style="list-style-type: none"> • 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. • Participates and contributes to the development of innovative approaches to client service delivery. • Independently applies new approaches to client service delivery and monitor and record the impact on service delivery. • Resolves problems in relation to client service delivery and foresees the consequences in relation to service delivery. 	<ul style="list-style-type: none"> - 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. - Actively participates in team casework meetings. - Contributes to discussions around program knowledge, trends and best-practices. - Attends training and conference and provides feedback to the Team. - Feedback from staff and stakeholders. 	
<p>Interpersonal Skills and Communication</p>	<ul style="list-style-type: none"> • Effectively and positively engages with other staff of the Service; other Teams within the Services and with external agencies, using a range of communication techniques including correspondence and use of electronic systems, in addition to telephone and personal inquiries. • Demonstrate a capacity to represent the Service in a range of forums, including FCAN, relevant external agencies such as community legal centres, dispute resolution agencies, interagencies; and working parties. 	<ul style="list-style-type: none"> - Communicates effectively and in a timely manner with clients, stakeholders, and respects confidentiality. - Communicate effectively through a range of media, including written, oral and electronic systems. - Is able to research and collate relevant information and prepare or contribute to reports. - Is aware of organisational protocols relating to conflict resolution. 	

	<ul style="list-style-type: none"> • Demonstrate a capacity to build and maintain a network of contacts within the Service, the Financial Counselling network and external agencies and effectively collaborate with those agencies to assist with resolving client issues. • Able to resolve conflict with assistance and seek more experienced support where necessary. 	<ul style="list-style-type: none"> - Effectively uses systems of the Financial Counselling Network to engage in and initiate discussions relevant to financial issues. - Feedback from internal and external stakeholders. - Client feedback, complaints and retention rates. 	
Experiences/Qualifications/Professional Development	<ul style="list-style-type: none"> • Diploma in Financial Counselling • Accreditation and registration from FCAN. 	<ul style="list-style-type: none"> - Presents qualifications and experience as part of the recruitment process. 	
FUNCTIONAL RESPONSIBILITIES			WEIGHTING
Client Services	<ul style="list-style-type: none"> • Understands that services are delivered to clients in accordance with client-focus principles. • Understands that the Service provides financial counselling to a range of clients with complex needs; and has a comprehensive understanding of the needs of those from culturally diverse and indigenous backgrounds, disabilities and low levels of literacy. • Understands that the Service provides financial counselling to clients presenting with a range of need, and in some instances may require multiple service delivery methods. 	<ul style="list-style-type: none"> - Can provide financial counselling in accordance with the principles of plain English. - Uses good listening skills to ensure that the needs of the client are identified as part of the counselling provided. - Ensures that the service is accessible and provides a safe and friendly environment to clients. - 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. 	

	<ul style="list-style-type: none"> • Able to provide referrals to other services as appropriate. • Assists the Service to maintain a list of alternate service providers, including financial, legal and community welfare. • Ensures clients have access to the Services' complaint processes. 	<ul style="list-style-type: none"> - Makes appropriate and effective referrals to internal and external services and programs. - Adheres to relevant policies and guidelines relating to client's consent, and authorities to act; and clients understand the financial counselling provided and action to be taken in relation to their financial commitments, or complaints to external dispute resolution agencies. - Makes appropriate judgement on client intake and eligibility. - Feedback from clients and stakeholders. 	
Financial Counselling and Casework	<ul style="list-style-type: none"> • Develops professional competence in the provision of financial counselling to clients and other workers in relation to financial issues. • Understands and maintains an up to date knowledge of legislation and government policies relevant to financial services and counselling, and providing advice to clients in relation to resolving financial hardship. • Understands the different forms of advice and counselling provided by the Service, and what assistance is appropriate to the individual client - telephone information; assistance in completing relevant forms; provision of face to face counselling or extended casework. 	<ul style="list-style-type: none"> - Provides financial counselling as required in accordance with the Service's policies and in accordance with FCAN requirements and standards. - Completes all essential training (CPD) to maintain registration with FCAN. - Maintains supervisions in line with FCAN accreditation. - Regularly participates in forums organised by FCAN or CCLC. - Maintains a folio of appropriate resource material to be provided to clients when 	

	<ul style="list-style-type: none"> • Provide support and resourcing to clients so that they can make their decisions in relation to pursuing applications or complaints to external dispute resolution agencies. • Able to identify appropriate cases where casework assistance can be provided in accordance with the Service’s policies on extended assistance. • Develops professional competence when representing clients in negotiations with financial or service providers, or representing clients in external dispute resolution agencies. 	<p>needed.</p> <ul style="list-style-type: none"> - Discusses case allocation and caseload with Team Leader and executes the role with competence. - Completes all forms and maintains files, including all appropriate copies of documents and any finalised reports that form part of the financial counselling within Metro assist online data CRM. - Provides timely reports to team leader as requested. - Feedback from clients and stakeholders. 	
Record Management	<ul style="list-style-type: none"> • 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"> - Enters client information onto the CDS data daily. - Maintain on regular basis all client’s files/ records to ensure they are up to date and entered as required in all reporting portals. - Maintains a diary for client appointments electronically with team and reception support - Opens and maintains client files in accordance with the Service’s policies on client files and record keeping. - Feedback from clients and stakeholders. - Provide reports and recommendations to the Family and Financial Inclusion Manager as directed. 	

<p>Policy and Law Reform</p>	<ul style="list-style-type: none"> • Has an understanding of law and policy reform processes adopted by governments in line with FCAN. 	<ul style="list-style-type: none"> - May contributes to law and policy reform responses by FCAN, CCLC or either of the Services. - Is able to identify appropriate case studies for the development of responses to law and policy reform through FCAN and CCLC. - Assists in appropriate research and preparation of submissions. - Attends and participates relevant meetings. Contributes to the organisation’s body of knowledge relating to their program and practices. - Feedback from clients and stakeholders. 	
<p>Community Financial Education</p>	<ul style="list-style-type: none"> • Understands the value of community education as both intervention and capacity building for clients of consumer and financial products. 	<ul style="list-style-type: none"> - Actively participates in team meetings to identify priorities and planning for community education. - Actively participates in the development of community education resources as required by the Service. - Deliver community education sessions as requested by the Service. - Actively participate in community information sessions as requested by the Service. 	

		<ul style="list-style-type: none"> - Feedback from clients and stakeholders. 	
Compliance/Reports	<ul style="list-style-type: none"> • Adheres to compliance and reporting requirements. • Adheres to registration requirements of FCAN. • Assists with the implementation of new/amended compliance and reporting requirements. 	<ul style="list-style-type: none"> - Provides timely and accurate reports, case notes and data to Team Leader and to the Department. - Informs manager and colleagues of issues as they arise and/or during supervision sessions. - Is conversant with, and adapts quickly to program and operational changes. - Feedback from staff, Department and other stakeholders. - Meets KPI's set within the role. 	
Business Communications	<ul style="list-style-type: none"> • Prepares short reports and accurate case notes. • Liaises and participates in discussions with staff and external agencies at all levels. • Deals with routine correspondence from outside centres. 	<ul style="list-style-type: none"> - Responds in a timely and efficient manner to emails and correspondence. - Shares information with team members and other staff, and identifies opportunities to reinforce and promote the program and its activities to clients and stakeholders through a range of mediums (eg: print, website, newsletters). - Is able to write and maintain minutes of meetings. - Feedback from staff and stakeholders. 	
Problem Solving/Innovation	<ul style="list-style-type: none"> • Understands and interprets complicated guidelines/procedures. Resolves problems 	<ul style="list-style-type: none"> - Engage in planning with staff, Manager and other services to address barriers to 	

	requiring the practical application of theory.	client access with the aim of strengthening services.	
Professional Development	<ul style="list-style-type: none"> • Participate in Metro Assist training. • Seek professional development outside Metro Assist as required. • Keep up to date with evidenced informed best practice. • Participate in professional development to ensure your professional registration is maintained as applicable. 	<ul style="list-style-type: none"> • Takes responsibility for maintaining own professional registrations and insurances (provides evidence). • Actively participates and shares experiences and professional knowledge. - Actively participates in Supervision and establishes goals. 	
<u>Special Projects/Tasks</u> As and when required by [Executive Officer/Manager/Team Leader]	<ul style="list-style-type: none"> • As and when required by the supervisor/Manager work on specific project/event related to the core functions. 	<ul style="list-style-type: none"> - Satisfactory completion of tasks/role 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’s 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.

Endorsed by: CEO March 2023

Employee 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: _____