



metro assist

## POSITION DESCRIPTION

### Financial Inclusion Team Leader

<b>Employment Status</b>	Part Time Fixed Term 26 hrs p/wk
<b>Industry Award</b>	SCHCADS Award Level 6
<b>Reporting to</b>	Family and Financial Inclusion Manager
<b>Directly Supervising</b>	Financial Counsellor and NILS Support Workers including student placements
<b>Work Area</b>	Inner West, Inner South West and South West Sydney
<b>Office Location</b>	Campsie and as required at other offices and outreach locations
<b>Conditions</b>	Employment for this position is subject to an "up to date" Covid-19 vaccination status, a satisfactory Working with Children and National Police check

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#### Position Summary

Metro Assist provides several financial inclusion support programs within the Inner West, Canterbury-Bankstown, Georges River, and Bayside LGA's. These include Financial Counselling, EAPA, No Interest Loans (NILS), and Emergency Relief Assistance.

The primary function of the program 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. The Team Leader will ensure the program meets funding and service agreements and will ensure that staff are appropriately trained and resourced to deliver services in compliance with organisational policies, funding agreements and relevant legislation.

#### The position is responsible for the following:

- Work with the management team to ensure that the financial counselling practice operates consistently with professional and ethical standards as required by Financial Counselling Australia (FCA) and the Financial Counselling Association of NSW.
- Supervising and leading a small team of Financial Counsellor and NILS support workers to ensure best practice in case management within an early intervention context.
- Provide leadership, mentoring, coaching, reflective practice opportunities for financial inclusion team members, including student placements, to support them in their professional development.
- Assist the team to identify and report on issues facing clients, attending external stakeholder

meetings and contributing to policy development, submission writing, and advocacy to promote industry best practice.

- Provision of team and individual supervision, including coordination of external supervision to support the team.
- Facilitation of case conferences and ensuring the team achieve contracted KPI's.
- Monitoring and adapting to broader policy and program changes.
- Reporting as per funding agreements, legislative and organisational requirements.
- Managing a small caseload to assist the team and supporting caseloads when staff are on periods of leave.
- Participate in the delivery of internal and external training, and other professional development activities as required.
- Maintaining relationships with key stakeholders and participate in and contribute to Financial Counsellors Association of NSW (FCAN), Financial Counselling Australia networks, NILS and EAPA networks and initiatives, or other sector meetings as required.

## KEY RESPONSIBILITY AREAS

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

	<ul style="list-style-type: none"> <li>• Ensures the security and protection of information assets under the custody.</li> <li>• Has an understanding of the Services' standards in relation to client representation and conflict of interest.</li> </ul>	<ul style="list-style-type: none"> <li>• Applies understanding of organisations policies and procedure, code of ethics and safe work practices.</li> <li>• Feedback from clients and stakeholders.</li> <li>• Attendance to security awareness training and prompt follow up on ISM improvement instructions.</li> <li>• Reports and responds to any suspected or actual security breaches.</li> </ul>	
<b>Leadership/Teamwork</b>	<ul style="list-style-type: none"> <li>• Able to work with minimal supervision and escalates issues as appropriate.</li> <li>• Works collaboratively within the Metro Assist Financial Inclusion program counselling services and Family and Financial inclusion team.</li> <li>• Able to independently monitor and amend their own schedule in response to their workload demands; and in response to team workload demands.</li> <li>• 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.</li> <li>• Understands the techniques of conflict resolution within the work environment.</li> <li>• Shows flexibility within the team so as duties are carried out in consistently and in accordance with the partnership model.</li> </ul>	<ul style="list-style-type: none"> <li>• Can supervised volunteers and students as required</li> <li>• 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.</li> <li>• Adheres to KPI's timeframes identified in workplans.</li> <li>• Initiative and participates in the development of Service submissions/responses to financial issues and working parties.</li> <li>• Feedback from team members and supervisor.</li> <li>• Demonstrates initiative and participates in team problem-solving.</li> <li>• Adopts a collegiate approach to complex cases and work management.</li> </ul>	
<b>Continuous Improvement</b>	<ul style="list-style-type: none"> <li>• Has an understanding of the elements of continuous improvement in relation to provision of financial counselling, micro finances; including why the process is</li> </ul>	<ul style="list-style-type: none"> <li>• Identifies and recommends changes to procedures, protocols and work systems, both internally and across relevant external services.</li> </ul>	

	<p>undertaken; how information and data is gathered and assessed; and how continuous improvement is applied.</p> <ul style="list-style-type: none"> <li>• Participates and contributes to the development of innovative approaches to client service delivery.</li> <li>• Independently applies new approaches to client service delivery and monitor and record the impact on service delivery.</li> <li>• Resolves problems in relation to client service delivery and foresees the consequences in relation to service delivery.</li> </ul>	<ul style="list-style-type: none"> <li>• Participates in service reviews, development and planning functions.</li> <li>• Actively participates in team casework meetings.</li> <li>• Contributes to discussions around program knowledge, trends and best-practices.</li> <li>• Attends training and conference and provides feedback to the Team.</li> <li>• Feedback from staff and stakeholders.</li> </ul>	
<p><b>Interpersonal Skills and Communication</b></p>	<ul style="list-style-type: none"> <li>• 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.</li> <li>• Demonstrate a capacity to represent the Service in a range of forums, including FCAN, FCA, NILS and other relevant external agencies such as community legal centres, dispute resolution agencies, interagencies; and working parties.</li> <li>• 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.</li> <li>• Able to resolve conflict with assistance and seek more experienced support where</li> </ul>	<ul style="list-style-type: none"> <li>• Communicates effectively and in a timely manner with clients, stakeholders, and respects confidentiality.</li> <li>• Communicate effectively through a range of media, including written, oral and electronic systems.</li> <li>• Is able to research and collate relevant information and prepare or contribute to reports.</li> <li>• Is aware of organisational protocols relating to conflict resolution.</li> <li>• Effectively uses systems of the Financial Counselling Network to engage in and initiate discussions relevant to financial issues.</li> <li>• Feedback from internal and external stakeholders.</li> <li>• Is aware of organisational protocols relating to partnership communication and conflict resolution and follows when required.</li> </ul>	

	necessary.	<ul style="list-style-type: none"> <li>• Is able to show empathy and use assertive and listening skills while dealing with clients and staff.</li> <li>• Maintains a respectful and professional approach towards positive relationship with stakeholders, staff and clients.</li> <li>• Feedback from partners, internal and external stakeholders.</li> </ul>	
<b>Experiences/Qualifications/Professional Development</b>	<ul style="list-style-type: none"> <li>• Diploma in Financial Counselling</li> <li>• Accreditation and registration from FCAN.</li> </ul>	<ul style="list-style-type: none"> <li>• Presents qualifications and experience as part of the recruitment process.</li> </ul>	
<b>FUNCTIONAL RESPONSIBILITIES</b>			<b>WEIGHTING</b>
<b>Team Management</b>	<ul style="list-style-type: none"> <li>• Provides strong leadership and guidance to team members to ensure the services provided are consistent with Metro Assist's mission, values and program guidelines.</li> <li>• Fosters a positive culture within the team and takes measures to ensure the wellbeing of individuals and the team.</li> <li>• Identifies opportunities for team members to engage in professional development relevant to their programs and services.</li> <li>• Models expected standards of workplace behaviour, and promotes teamwork and collaboration whilst fostering productive working relationships with all team members.</li> </ul>	<ul style="list-style-type: none"> <li>• Monitors team performance and corrects practices and behaviours where necessary.</li> <li>• Ensures staff are meeting KPI's through regular monitoring and monthly evaluation.</li> <li>• Provides effective and regular supervision and guidance to the team in meeting funding and organisational objectives.</li> <li>• Ensures team members abide by Code of Conduct and organisational policies and procedures.</li> <li>• Addresses individual or team grievances effectively and timely manner, in consultation with the Family &amp; Financial Inclusion Programs Manager and HR Manager.</li> <li>• Motivates the team in the face of new</li> </ul>	

		<p>challenges.</p> <ul style="list-style-type: none"> <li>• Conveys directives and messages coming from Contract Lead to the team.</li> <li>• Consults regularly with the team, especially on new initiatives, changes to policies, processes and other organisational matters.</li> <li>• Conducts team meetings regularly.</li> <li>• Conducts annual performance appraisals for all staff.</li> </ul>	
<p><b>Client Services</b></p>	<ul style="list-style-type: none"> <li>• Understands that services are delivered to clients in accordance with client-focus principles and person centred</li> <li>• Understands that the service provides financial inclusion 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.</li> <li>• Identify community needs and submit application for relevant grant that support current and new programs, projects and or events</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure that services are respectful, sensitive, appropriate</li> <li>• Ensure that all financial inclusion workers are delivering person centred case management</li> <li>• Ensures that the service is accessible and provides a safe and friendly environment to clients.</li> <li>• 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.</li> <li>• Able to provide appropriate and effective referrals to internal and external services and programs.</li> <li>• Conducts weekly case reviews with the team to identify and shortcoming and potential improvement.</li> <li>• Adheres to relevant policies and guidelines relating to client's consent, and</li> </ul>	

		<p>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.</p> <ul style="list-style-type: none"> <li>• Makes appropriate judgement on client intake and eligibility.</li> </ul>	
<b>Data Management and Reporting</b>	<ul style="list-style-type: none"> <li>• Report to Family and Financial Inclusion Programs Manager Day to day and through regular supervision sessions.</li> <li>• Monitor and ensure that the team data reporting obligation are being met in accordance with organisation and contractual requirements.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensures that data is collated and reported in accordance with funding agreements..</li> <li>• Ensures that all reporting and case files (paper based and electronic) by team are of the highest quality standard, case notes are thorough and entered into data reporting portals regularly.</li> <li>• Ensures that all data is protected to ensure clients privacy and confidentiality.</li> <li>• Ensures that all data reports are completed by required deadlines.</li> <li>• Provides data capture and evidence gathering for reporting including case studies to demonstrate the “practice” in service delivery.</li> <li>• Contributes information and data for reports to the Metro Assist Board.</li> <li>• Conducts regularly audits of staff case note file (electronic and paper) and reports back any concerns as per policy and procedure.</li> </ul>	
<b>Risk Management</b>	<ul style="list-style-type: none"> <li>• Acts within delegated authority.</li> <li>• Ensures a safe and healthy work environment in accordance with all organisational WHS safety standards, policies and procedures.</li> </ul>	<ul style="list-style-type: none"> <li>• Identifies and communicates risks to clients, staff and to the organisation where reputational risk exists.</li> <li>• Contribute and provide feedback to Risk Management Framework.</li> </ul>	



	<ul style="list-style-type: none"> <li>Ensures that service delivery and staff comply with organisational policies and procedures, Code of Conduct, and relevant industry standards.</li> </ul>	<ul style="list-style-type: none"> <li>Ensures risks, hazards and incidents are reported and managed as per WHS policies and procedures.</li> </ul>	
<b>Stakeholder Relationship and Engagement</b>	<ul style="list-style-type: none"> <li>Maintains a positive working relationship with the contract manager.</li> <li>Develop/maintain strategic relationships with all internal and external stakeholders.</li> </ul>	<ul style="list-style-type: none"> <li>Maintains positive and collegial relationships with representatives of funding departments</li> <li>Participates in forums, interagencies and advisory bodies within the sector, and advocates for the needs of CALD clients.</li> <li>Seeks opportunities to build and maintain relationships with services and support agencies.</li> <li>Responds to requests and reports to contract managers in an accurate and timely manner.</li> </ul>	
<b>Financial Management</b>	<ul style="list-style-type: none"> <li>Responsible management of financial resources within program.</li> </ul>	<ul style="list-style-type: none"> <li>Monitors expenditure within program budget.</li> <li>Supervises staff use of resources and finances.</li> <li>Acts within delegated authority.</li> <li>Completes acquittals for community grants as required.</li> <li>Identifies and reports any fraudulent use of resources within the organisation, or by suppliers/contractors.</li> </ul>	
<b>Policy and Law Reform</b>	<ul style="list-style-type: none"> <li>Has an understanding of law and policy reform processes adopted by governments in line with FCAN.</li> </ul>	<ul style="list-style-type: none"> <li>May contribute to law and policy reform responses by FCAN, CCLC or either of the Services.</li> <li>Is able to identify appropriate case studies for the development of responses to law</li> </ul>	

		<p>and policy reform through FCAN and CCLC.</p> <ul style="list-style-type: none"> <li>• Assists in appropriate research and preparation of submissions.</li> <li>• Attends and participates relevant meetings. Contributes to the organisation's body of knowledge relating to their program and practices.</li> <li>• Feedback from clients and stakeholders.</li> </ul>	
<b>Compliance</b>	<ul style="list-style-type: none"> <li>• Complies with Metro Assist information security policy, standards, plan and procedures relevant to program area.</li> <li>• Ensures the security and protection of information assets under the custody.</li> <li>• Adheres to registration requirements of FCAN.</li> </ul>	<ul style="list-style-type: none"> <li>• Attendance to security awareness training and prompt follow up on ISM improvement instructions.</li> <li>• Reports and responds to any suspected or actual security breaches.</li> </ul>	
<b>Professional Development</b>	<ul style="list-style-type: none"> <li>• Participate in Metro Assist training.</li> <li>• Seek professional development outside Metro Assist as required.</li> <li>• Keep up to date with evidenced informed best practice.</li> <li>• Participate in professional development to ensure your professional registration is maintained as applicable.</li> </ul>	<ul style="list-style-type: none"> <li>• Takes responsibility for maintaining own professional registrations and insurances (provides evidence).</li> <li>• Actively participates and shares experiences and professional knowledge.</li> <li>• Actively participates in Supervision and establishes goals.</li> </ul>	
<b><u>Special Projects/Tasks</u></b> <b>As and when required by [Executive Officer/Manager/Team Leader]</b>	<ul style="list-style-type: none"> <li>• As and when required by the supervisor/Manager work on specific project/event related to the core functions.</li> </ul>	<ul style="list-style-type: none"> <li>• Satisfactory completion of tasks/role within defined Scope, specification, time frames and budget.</li> </ul>	

### **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 May 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: \_\_\_\_\_