

SCHEDULE B – POSITION DESCRIPTION

POSITION DETAILS	
Position Title:	Financial Counsellor
Reporting To:	Community Services Manager
Direct Reports:	Nil
Service Area:	Financial Counselling
Location:	Ellenbrook and Midland
Award:	SCHADS
Classification:	Level 5
Date Approved:	October 2023
<i>This position is subject to continued funding</i>	
POSITION OBJECTIVES	
<p>Working as part of the Financial Counselling Network (“FCN”) and within the Midlas Financial Counselling Team, the Financial Counsellor will support individuals and families who are experiencing, or are at risk of experiencing, financial hardship to build their financial stability and resilience.</p> <p>The Financial Counsellor will provide client assessments, casework management, consumer advocacy and ensure data and records are maintained to meet reporting and funder requirements.</p>	
Screening and external authorisation requirements:	<p>An innate element of the position requires access to personal information of vulnerable people including children.</p> <p>It is a requirement that the incumbent has or is willing to get the following current checks/certificates and provide to Midlas:</p> <ul style="list-style-type: none"> • National Police Check • Working With Children Check • COVID-19 Vaccination Certificate

ORGANISATION INFORMATION

Our Purpose:

Providing advocacy, education, information and advice that empowers people to thrive.

Our Vision:

Social justice and equity through access to rights and opportunity.

Our Values:

- Collaboration
- Compassion
- Inclusion
- Excellence

Midlas is an Equal Opportunity Employer

STAKEHOLDER RELATIONSHIPS

INTERNAL

- Senior Financial Counsellor
- Financial Capability and Coaching Team
- Financial Counselling Team
- Midlas Executive Leadership Team
- Midlas employees and volunteers

EXTERNAL

- Financial Counselling Network
- FCAWA
- Clients
- Referral Partners, other service providers and groups
- Provision of information to community members

POSITION RESPONSIBILITIES

Key Result Area	Responsibilities (including but not limited to):
Stakeholder Engagement	<ul style="list-style-type: none"> • Engaging with the FCN and referral partners to develop appropriate case management processes. • Interact and liaise with relevant organisations providing information and support to community workers
Financial Counselling	<ul style="list-style-type: none"> • Provide a high-quality holistic financial counselling service including best practice advocacy services for people experiencing financial difficulty • Providing group education and training sessions to enhance client confidence and resilience in relation to financial capacity and capability

	<ul style="list-style-type: none"> • Providing one on one support that results in increased financial capability and improved financial resilience • Providing a high quality of goal focussed financial counselling as needed • Other duties as required
Internal Processes	<ul style="list-style-type: none"> • Participate in professional development activities, case reviews and training • Work with a multi-disciplinary team and provide support through sharing of skills and knowledge • Actively participate in staff meetings • Undertake and participate in staff appraisal processes • Participate in industry associations and networks to ensure awareness of current trends and options available
Data Monitoring and Collection	<ul style="list-style-type: none"> • Completing reporting requirements of the funder • Identify and share case studies as required • Ensure client files and case notes are entered in a timely manner and high level of accuracy is maintained through Midlas' client management system • Survey clients to assess for continuous improvement measures and positive outcomes
Compliance and Record Keeping	<ul style="list-style-type: none"> • Ensuring client file processing, filing and archiving is performed in line with organisational and FCN requirements • Ensuring documentation meets organisational and FCN requirements • Ensuring service is provided in accordance with requirements of the Privacy Act and other relevant legislation, FCN and funder policy, procedures and conditions • Maintain knowledge of and adhere to policies and procedures of the organisation
Work Health and Safety	<ul style="list-style-type: none"> • Embracing a safety culture and actively participating in workplace safety activities, including client risk reporting, hazard and incident reporting • Apply best practice in WHS in accordance with statutory obligations at all times. • Take reasonable care for their own health and safety and for that of others in the workplace by working in accordance with legislative requirements and the company's WHS policies and procedures • Take reasonable care their actions or omissions do not adversely affect the health and safety of themselves and others Cooperate with any reasonable directions, policies and procedures relating to health and safety in the workplace • Report all injuries, illness or 'near misses' to their line Manager

	<ul style="list-style-type: none"> • Participate in relevant health and safety training based on roles and responsibilities • As required, participate in the development and implementation of specific WHS hazard and risk management strategies. • Positions with supervision or management responsibility are required to ensure a safe and healthy work environment for all employees, clients, contractors and visitors. • Positions with supervision or management responsibility are required to ensure all people are aware of and have access to WHS policies, procedures, training and reporting systems.
General	<ul style="list-style-type: none"> • Other duties as required

POSITION REQUIREMENTS

Required Education/Licences/Certificates

- Hold a Diploma of Community Services - Financial Counselling
- Be a member/eligible to be a member of the Financial Counsellors Association of WA
- Possession of a current unrestricted driver's license and reliable vehicle
- Possession of current satisfactory National Police clearance certificate (no older than 6 months from the issue date) and ongoing renewal every 2 years at employee's expense
- Possession of Working with Children Check
- COVID-19 vaccination certificate

Relevant Experience, Skills/Knowledge & Personal Attributes

- Experience in client assessments, casework management, consumer advocacy and the ability to maintain records and statistics
- Sound understanding of the social issues facing financially disadvantaged clients and their families
- Knowledge of the relevant legislation and information pertaining to financial issues including current debt practices, Bankruptcy legislation and credit codes
- Demonstrated ability to engage in financial assessment and provide financial counselling
- Demonstrated capacity to advocate and negotiate on behalf of clients
- Demonstrated ability to work unsupervised as well as an effective team player with a positive can-do attitude
- Experienced in preparing and presenting community education, and to raise public awareness on relevant issues
- Demonstrated skills and competencies assisting individuals experiencing credit and debt issues to understand their rights and obligations
- Demonstrated efficiency in time management, planning and organizational skills
- Ability to work independently and within a team
- Excellent communication skills
- Passion for educating and working with individuals to achieve longer behavioral change
- Proficient in the use of MS Office and client database management systems

ACCEPTANCE OF POSITION DESCRIPTION

In signing this position description, you confirm that you have read, understood and accept the responsibilities as contained in this Position Description.

Position	Name	Signature	Date
Incumbent			
Line Manager			