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## Schedule B – Position Description

**Organisation** Midland Information Debt and Legal Advocacy Service Inc (Midlas)

**Position Title** Financial Counsellor

**Department** Financial Counselling

**Reporting To** Senior Financial Counsellor

**Vision** Building Resilient Communities

**Mission** We partner with individuals and organisations to promote independence, strength and wellbeing in our community through support, advocacy and education

**Values** Caring for people

Developing Partnerships

Supporting our Community

**Location** 23 Old Great Northern Highway Midland WA 6056

Midlas is an Equal Opportunity Employer

This position is subject to continued funding

**KEY RESPONSIBILITIES**

1. Provide best practice advocacy services for people experiencing financial difficulty;
2. Work closely with government departments, FCAWA, utility providers, financial service organisations and other community agencies to increase knowledge, skills and confidence of individuals, families and communities;
3. Develop and liaise with key stakeholders to ensure good referral pathways, enhanced service provision and optimal client outcomes;
4. Devise, organise and present community education to build financially resilient communities;
5. Play an active and constructive role in the Midlas client services team, working together to achieve the strategic direction of the organisation;
6. Ensure that the organisation meets its statutory and contractual obligations.

**STATEMENT OF DUTIES**

**Service Delivery**

1. Conduct assessments with individuals and families, providing advocacy and facilitating self-advocacy and independence;
2. Work collaboratively with individuals and families to develop action plans;
3. Provide information, advocacy, support, negotiation, options and appropriate referrals;
4. Provide financial management budgeting plans and asset building tools;
5. Provide emergency relief as appropriate;
6. Maintain a high standard of case work management including the provision of timely follow-up actions as required;
7. Support team members to ensure that individuals or families receive a holistic service and complex cases are managed appropriately.

**Community Engagement**

1. Devise strategies and deliver community education to facilitate the building of financially resilient communities across client services;
2. Liaise with networks and communities to strengthen our profile and promote sustainable growth;
3. Regularly contribute information, trends and articles relevant to building financially resilient communities for Midlas to produce in its media content;

**Administration and Reporting**

1. Keep accurate records and comprehensive database entries;
2. Undertake quantitative and qualitative reporting to the Board, Midlas management team, funding bodies and other agencies as required;
3. Contribute to preparation of funding submissions;
4. Undertake regular internal quality audits and file reviews;
5. Be aware of and adhere to the Midlas Disability Access and Inclusion Plan;
6. Maintain an updated financial services resource and referral file;
7. Operate within the financial program budget.

**Other Duties**

1. Work in partnership with the client services team to ensure that there is consistency, continuous improvement and cohesiveness within the client services team;
2. Support and work in accordance with Midlas policies and procedures;
3. Support the organisational strategic focus and objectives;
4. Work as an active partner in building relationships across the metropolitan financial counselling network (FCN) and commits to a process of continuous improvement which builds the financial counselling system and strengthens outcomes for people and the community;
5. Other duties as directed by management.

**Selection Criteria**

**Essential**

1. Demonstrated high level of communication skills, both written and oral, including interpersonal, negotiation and client centred advocacy skills;
2. Knowledge and experience of financial literacy and financial capability tools;
3. Working towards or hold a Diploma of Financial Counselling;
4. Previous experience in financial counselling or a financial services organisation;

**Desirable**

1. Ability to prepare and present community education, and to raise public awareness on relevant issues;
2. Knowledge and experience of the National Credit Code and the Bankruptcy Act 1966.

**Special Requirements**

Provision of a clear Police clearance certificate.

**Limitation of Authority**

The Financial Counsellor is authorised to take any reasonable action necessary to achieve the requirements contained in this job description, provided such action is within the framework of policies and procedures of Midlas and any other specific directives of the Chief Executive Officer.

This Job description works with and relies upon the current separate Key Performance Indicators.

This position works as an important part of the metropolitan financial counselling network and delivers their financial counselling service in line with the expectations outlined in the relevant resources and supports.

Employee: Date:

CEO Date: