



metro assist

## POSITION DESCRIPTION

### Financial Capability Worker

<b>Employment Status</b>	Part Time Fixed Term (21hrs p/wk)
<b>Industry Award</b>	SCHADS Award Level 2
<b>Reporting to</b>	Family and Financial Inclusion Manager
<b>Directly reports</b>	Nil
<b>Area of Work</b>	Bankstown LGA
<b>Office Location</b>	Bankstown and other sites as required
<b>Conditions</b>	Employment for this position is subject to a satisfactory Working with Children Check and National Police check

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#### Position Summary

Through educational sessions held within the community, our Financial Capability workers provide valuable insights and resources to help clients build essential budgeting skills and make informed financial decisions. Additionally, they assess clients eligible for Emergency Relief (ER) and Emergency Assistance (EAPA) to provide tailored support and guidance.

By fostering a supportive environment and offering practical assistance, Metro Assist strives to empower individuals to achieve greater financial stability and wellbeing.

Key functions of the role include, but are not limited to:

- Deliver comprehensive financial literacy education to the Bankstown Local Government Area (LGA) community, with a particular focus on Culturally and Linguistically Diverse (CALD) groups.
- Conduct thorough assessments of eligible clients for Emergency Relief (ER) and Emergency Assistance (EAPA), evaluating individual circumstances against budgetary considerations.
- Provide targeted support to clients through educational programs aimed at enhancing financial knowledge, skills, and capabilities, thereby facilitating their path to employment.
- Priorities support for key client groups, including individuals receiving Commonwealth social security benefits, newly arrived migrants/non-citizens (with emphasis on newly arrived refugees), and women experiencing family violence, with the goal of fostering financial independence.
- Actively promote services and cultivate relationships with key stakeholders within the funded LGAs.

- Ensure accurate and up-to-date data collection and reporting, maintaining detailed records of client interactions, case notes, and supporting documentation for both internal and external reporting purposes.
- Fulfill all requirements regarding the recording and management of Emergency Relief (ER) and Emergency Assistance (EAPA) assistance, as stipulated by Metro Assist and external funding bodies.
- Offer tailored advice and information to improve clients' financial capability, including budgeting assistance and referrals to relevant external bodies such as the NSW Ombudsman or EWON for complaints resolution.
- Conduct initial screenings of clients to determine eligibility and identify individual needs, facilitating a wraparound approach to service provision aimed at optimising outcomes.
- Make appropriate referrals and bookings for clients, directing them to relevant internal or external programs as needed.

**KEY RESPONSIBILITY AREAS**

KEY RESPONSIBILITY AREAS	ROLE REQUIREMENTS	KEY PERFORMANCE MEASURES	WEIGHTING
<p><b><i>Vision, Mission, Values</i></b></p>	<ul style="list-style-type: none"> <li>• Working knowledge of the Metro Assist’s Vision, Mission, Values, client requirements and the community context.</li> <li>• Has a general knowledge of administrative functions within the organisation; and of network services, and referral agencies.</li> <li>• Has a working knowledge of the functions of other projects within the Family and Financial Inclusion Team.</li> </ul>	<ul style="list-style-type: none"> <li>• Understands and articulates significance of Centre’s Vision, Mission and Values; and follow organisational values in day-to-day work.</li> <li>• Understands and articulates the significance of the FC/EAPA/ER/NILS programs within the financial inclusion team.</li> <li>• Make effective contact across Metro Assist sites for program information and collection and dissemination.</li> <li>• Feedback from client surveys and stakeholders is positive.</li> <li>• Adheres to identified targets in program work plans KPI’s and funding agreement KPI’s</li> </ul>	<p>N/A</p>
<p><b><i>Leadership / Teamwork</i></b></p>	<ul style="list-style-type: none"> <li>• Able to work with minimal supervision and escalates issues as appropriate.</li> <li>• Shows by example a high level of motivation and sustained discipline to provide effective service to clients.</li> <li>• Participates in providing solutions to problems associated with specific areas of responsibility.</li> <li>• Works collaboratively within the Inner Western Sydney Financial Counselling Service, and Family and Financial Inclusion Team.</li> <li>• Has knowledge of conflict resolution as a tool within the work environment.</li> <li>• Establish and maintain positive working relationships with colleague that are fair, professional, supportive and respectful.</li> </ul>	<ul style="list-style-type: none"> <li>• Adheres to timeframes identified in workplans and targeted KPI’s.</li> <li>• Participates in team meetings, team planning and in implementing team activities in a timely and effective manner.</li> <li>• Demonstrates initiatives as appropriate and participates in team problem-solving.</li> <li>• Provides on-the-job coaching to students and volunteers.</li> <li>• Adopts a collegiate approach to case work and work management.</li> <li>• Feedback from team members and supervisor</li> </ul>	<p>N/A</p>

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<b><i>Interpersonal Skills / Communication</i></b>	<ul style="list-style-type: none"> <li>• Deals regularly and promptly with correspondence, telephone or IT enquiries from organisational partners and internal Metro Assist teams; clients; suppliers or external organisations.</li> <li>• Able to resolve conflict with assistance and report back as required.</li> <li>• Uses positive engaging techniques when dealing with clients, staff, partners and external organisations.</li> <li>• Has effective listening skills and seeks, provides and/or shares information in an appropriate and respectful manner.</li> <li>• Deals with emerging crises as appropriate and seeks more experienced support where necessary.</li> </ul>	<ul style="list-style-type: none"> <li>• Communicates effectively and in a timely manner with partners, clients, stakeholders, and respects confidentiality.</li> <li>• Is aware of organisational protocols in relation to the Financial Counselling Program communication and conflict resolution, and followed when required.</li> <li>• Is able to show empathy and use assertive and listening skills when dealing with clients and staff.</li> <li>• Feedback from internal and external stakeholders.</li> </ul>	N/A
<b><i>Continuous Improvement / Quality</i></b>	<ul style="list-style-type: none"> <li>• Suggests changes to improve quality in own work area and makes agreed changes.</li> <li>• Identifies opportunities for improvement and suggests amendments to documentation/processes.</li> <li>• Participates and contributes to the development of innovative approaches to client service delivery.</li> <li>• Identifies problems in relation to client service delivery and able to identify the consequences in relation to service delivery, and seek appropriate assistance.</li> </ul>	<ul style="list-style-type: none"> <li>• Contributes to discussions around administrative practices and trends.</li> <li>• Attends training and workshops and keeps work knowledge up to date.</li> <li>• Actively participates within the financial and family team meetings; and participates as required within the financial counselling sector.</li> <li>• Identifies and recommends changes to procedures, protocols and work systems, both internally and across relevant external services.</li> <li>• Participates in service reviews, development and planning functions.</li> <li>• Contributes to discussions around program knowledge, trends and best-practices.</li> <li>• Adapts readily and positively to changes in procedures,</li> </ul>	N/A

KEY RESPONSIBILITY AREAS	ROLE REQUIREMENTS	KEY PERFORMANCE MEASURES	WEIGHTING
		protocols and work systems.	
<b><i>Practices / Safety / Standards</i></b>	<ul style="list-style-type: none"> <li>• Adheres to Metro Assist Policies and procedures, service delivery standards, staff code of conduct, and all relevant government legislation (eg, WH&amp;S) and relevant standards.</li> <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>• Adhere to Financial inclusion program (FC/ ER/ EAPA/ NILS) guidelines and recommended work practices and seek assistance when required.</li> <li>• Has an understanding of the Service’s standards in relation to client representation and conflict of interest.</li> </ul>	<ul style="list-style-type: none"> <li>• Is conversant with organisational policies and procedures, codes of conduct and relevant legislation and safe work practices and applies the polices effectively in own practice.</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> <li>• Applies understanding of organisation’s policies and procedure, code of ethics and safe work practices.</li> <li>• Has an appropriate clearance under working with children requirements and National Police check.</li> </ul>	N/A

## Functional Requirements

KEY RESPONSIBILITY AREAS	ROLE REQUIREMENTS	KEY PERFORMANCE MEASURES	
<p><i>Client Intake</i></p>	<ul style="list-style-type: none"> <li>• Respond to allocated client intake within 5 business days to be seen for ER AND EAPA.</li> <li>• Complete all administrative tasks in regards to intake process as required.</li> <li>• Respond to any messages and follow up within a timely manner.</li> <li>• Refer clients to appropriate internal and external agencies as required.</li> <li>• Provide general information about the service to the clients and external stakeholders</li> <li>• Understands that services are delivered to clients in accordance with client-focus principles.</li> <li>• Understands that part of the role of the Financial inclusion worker is to provide financial information to clients, and identify those matters that can be resolved immediately through financial capability or require financial counselling; or referral to other services.</li> <li>• Assists the Service to maintain a list of alternate service providers, including legal, emergency accommodation and community welfare.</li> <li>• Ensures clients have access to the Service’s and Centre’s complaint processes.</li> </ul>	<ul style="list-style-type: none"> <li>• Respond to all enquires within a timely manner. All intake/ bookings to be allocated for an appointment within 5 business days.</li> <li>• Confidentially assess the client to ensure that they are experiencing immediate financial hardship to access the program.</li> <li>• Record all incoming enquiries accurately and in a timely manner including CDS and any other reports as required.</li> <li>• Uses good listening skills to ensure that the needs of the client are identified as part of the information provided.</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>• Makes appropriate and effective referrals to internal and external services and programs.</li> <li>• Adheres to relevant policies; codes of conduct and ethics and guidelines relating to clients consent, and authorities to act; and clients understand the information provided and action to be taken in relation to creditors, or complaints to bodies such as the NSW Ombudsman.</li> <li>• Makes appropriate judgement on client intake and eligibility and seeks assistance where necessary.</li> <li>• Feedback from clients and stakeholders.</li> </ul>	

KEY RESPONSIBILITY AREAS	ROLE REQUIREMENTS	KEY PERFORMANCE MEASURES	
<b>Client Services and Program Management</b>	<ul style="list-style-type: none"> <li>• Is able to identify and monitor the needs of vulnerable community members and has knowledge of local services and networks.</li> <li>• Contributes to service development within the organisation.</li> <li>• Adheres to program guidelines and competently delivers community development activities identified in service agreements.</li> <li>• Provide non-accredited financial literacy education to the community of Bankstown LGA though not limited with the aim of CALD community</li> </ul>	<ul style="list-style-type: none"> <li>• Ensures that the service is accessible, safe and friendly and appropriate referrals are made.</li> <li>• Supports clients' use of infrastructure in accordance with internal P&amp;P.</li> <li>• Delivers information and available resources to groups in various settings (schools, community centres etc) and as directed by Manager.</li> <li>• Participates in service reviews and program evaluation.</li> <li>• Adheres to relevant policies and guidelines relating to program service agreements.</li> <li>• Maintains and records data and feedback from community engagement including client survey.</li> <li>• Facility and implement all aspect of educational workshops that addresses the funding guidelines to achieve KPI's.</li> </ul>	<b>Client Services and Program Management</b>

KEY RESPONSIBILITY AREAS	ROLE REQUIREMENTS	KEY PERFORMANCE MEASURES	
<b><i>Data Entry/Records Management</i></b>	<ul style="list-style-type: none"> <li>• Ensure file records and statistical data on client contacts are accurately recorded in CDS and external portal as required</li> <li>• Adheres to compliance and reporting requirement Including working knowledge for reporting purposes.</li> <li>• Compliance with privacy and information security.</li> <li>• Adheres to compliance and reporting requirements including the daily reporting on CDS and any funding system.</li> <li>• Has a thorough understanding of the need for record keeping and filing systems.</li> </ul>	<ul style="list-style-type: none"> <li>• All file records and data entry is completed in an accurate and timely manner (internal and external).</li> <li>• Ensures compliance with law and internal policies with regard to client data and case information.</li> <li>• Enters client information onto CDS internal reporting on a regular bases for DEX reporting .</li> <li>• Maintains files for clients, that include recording of telephone/electronic conversations/messages; and record details and outcomes of face to face appointments and other conversations or correspondent.</li> <li>• Enter clients information on EAPA program as required including entering data onto CDS for internal reporting.</li> </ul>	
<b><i>Compliance/Reporting</i></b>	<ul style="list-style-type: none"> <li>• Adheres to compliance and reporting requirements.</li> <li>• Assists with the implementation of new/amended compliance and reporting requirements.</li> <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 custody.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure that all RA and EAPA application are correctly uploaded onto EAPA and CDS.</li> <li>• Provides timely and accurate reports, case notes and data to the Manager.</li> <li>• Meets KPI's set within the role.</li> <li>• Informs the Manager of issues as they arise and/or during supervision sessions.</li> <li>• Is aware of, and able to articulate program and operational changes.</li> <li>• Manage and maintain all intake and referral for financial counselling.</li> <li>• Feedback from staff, Department and other stakeholders.</li> <li>• Attendance at security awareness training and prompt follow up on ISM improvement instructions.</li> </ul>	



KEY RESPONSIBILITY AREAS	ROLE REQUIREMENTS	KEY PERFORMANCE MEASURES	
		<ul style="list-style-type: none"> <li>• Reports and responds to any suspected or actual security breaches.</li> </ul>	
<b>Experiences/Qualifications/Professional Development</b>	<ul style="list-style-type: none"> <li>• Some budgeting experience – a TAFE certificate II, III or IV in business or a related field would be more than adequate – a Community (evening) College qualification in budgets would also be adequate</li> </ul>	<ul style="list-style-type: none"> <li>• Presents qualifications and experience as part of the recruitment process.</li> <li>• Participates in professional development opportunities in line with Metro Assist policies and procedures, and Financial Counselling program guidelines.</li> </ul>	
<b><i>Special Projects/tasks</i></b>	<ul style="list-style-type: none"> <li>• As and when required by the Manager work on specific projects/events related to the core functions of programs.</li> </ul>	<ul style="list-style-type: none"> <li>• Satisfactory completion of project/tasks 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 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.

**Date Prepared/Updated**      *November 2024*

**Approved**                      *Chief Executive Officer*

**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: \_\_\_\_\_