

## Position description

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<b>Title</b>	Financial Capability & Intake Officer - Telephone & Online
<b>Reports to</b>	Team Lead – Telephone and Online
<b>Classification &amp; Salary</b>	SCHCADS Level 5 (plus super and salary packaging)
<b>Employment Status</b>	Full Time, Fixed Term until 25 February 2022
<b>Primary Location</b>	Working from home
<b>Date</b>	August 2021

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### **Good Shepherd Australia New Zealand (GSANZ)**

Our strategy outlines the world we want to see and our role advancing in it. It also speaks to the positive impact we will deliver to support women, girls and families to be safe, secure, strong and connected. We are committed to tackling the issues of our time which adversely affect them. We work to advance equity and social justice and support our communities to thrive.

We seek to increase economic participation and wellbeing, to build resilience, improve safety and bring about system change. We offer microfinance programs and products, financial counselling and coaching, family violence support, family and youth programs, playgroups, education programs and community houses. These services are complemented by research and advocacy to address the underlying structural causes of injustice, exclusion, and inequality.

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### **Role Purpose**

Good Shepherd employees are committed to inclusive practice that responds to the specific needs, context and circumstances of service participants. We embrace the diversity and intersectionality of individuals and recognise a person's right to a unique identity comprising culture, language, ability, community, gender, sex, sexual orientation and lived experience.

### **The Telephone and Online team**

This role will form a part of a broader team of skilled professionals working closely to deliver a holistic, multi-channel model of support across economic wellbeing, family violence and family services that is person centred and linked into community support services.

This National team will ensure that people who present with financial and personal disadvantage as a result of COVID 19 are supported and empowered to address immediate and longer term financial and personal risks and vulnerability.

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As a Good Shepherd Financial Capability Intake Officer, part of the Telephone and Online Team you will:

- Receive and triage intake calls, show empathy and take a client-directed approach that empowers and supports a person to tell their story, enables you to identify disadvantage or trauma and ensures appropriate referral.
- Work with the client eligible for a Telephone and Online loan to collect information in the loan origination system, identifying points in the process where you can provide financial capability support.
- Understand vicarious trauma; be able to lead a conversation through a trauma informed lens; have empathy for the challenges faced by people with varied lived experience; and take a situational approach when supporting each person.
- Be able to recognise personal risk factors that may indicate family violence, mental health distress or child abuse and neglect; prioritise, triage and refer to other sources of support and assistance in alignment with the client's goals.
- Be able to recognise financial risk factors, prioritise and triage to financial counselling, financial wellbeing or legal supports, in alignment with the client's goals
- Ensure that consultation with and referral to other services complies with privacy, consent and information sharing requirements.
- Be culturally sensitive and aware and adapt your practice to accommodate the diverse needs, background and identify of each individual.
- Always comply with GSANZ policy, procedure and code of conduct.

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### **Key Responsibilities**

- As the initial point of client contact, you will be required to assess a person's presenting financial, personal and any other relevant circumstances; provide information and options, agree and obtain client consent for referral.
  - Undertake high quality, trauma informed intake and assessment and provide initial support, consultation, triage and warm referral to internal or external services. Internally the person may be directed to a, Financial Counsellor, Social Worker, Family Violence Worker, and Family Support Worker. You may refer to external organisation where appropriate.
  - Collect and enter client information taken during intake into the relevant systems (including the loan origination system) or share information as appropriate.
  - Consult, refer and collaborate with other team members, including financial counselling and financial wellbeing peers, other GSANZ services and the broader service sector to support client goals
  - Consult, learn and implement new ways of working and quickly adopt new systems and processes to improve client outcomes.
  - Comply with GSANZ policy, procedures and practice and participate in GSANZ organisational activities
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## **Responsibilities of Good Shepherd Employees**

### **Strategy**

- Deliver service aligned with team operational plan and Good Shepherd's strategic plan
- Contribute to development of team plan
- Demonstrate understanding of social justice and community capability building concepts

### **People**

- Demonstrate commitment to own learning and development
- Contribute to development of a high-performance team through demonstration of capabilities outlined in Good Shepherd's leadership capability framework
- Participate actively in regular formal supervision
- Share knowledge and practice insights with colleagues
- Take responsibility for own wellbeing

### **Clients**

- Deliver best practice service to clients in line with agreed goals/contribution
- Seek feedback from client/stakeholders/peers in order to reflect and improve on service support for own practice
- Maintain a client-centred approach to service delivery at all times

### **Service Delivery and Operations**

- Deliver all services in line with service standards and program procedures
- Maintain accurate data, information and reporting at all times
- Maintain agreed service level agreements
- Provide timely reporting in line with department requirements
- Other duties as reasonably required

### **Stakeholders**

- Liaise effectively with referral network
- Work collaboratively with other service providers to deliver valued outcomes for clients
- Develop constructive, collaborative relationships with other Good Shepherd team members and departments

### **Compliance**

- Demonstrate behaviour consistent with Good Shepherd mission, values, behaviours and policies at all times
  - Maintain agreed quality standards
  - Maintain OH&S standards at all times
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### **Qualifications, Experience and Mandatory Requirements**

- Minimum requirements – Diploma in Financial Counselling; or Core Financial Capability units of the Diploma of Financial Counselling; or Diploma Community Services
- Experience in community service, financial counselling or financial capability service delivery
- Ability to communicate and demonstrate human rights, social and economic justice in practice
- Understanding of the Australian financial and credit system, including debt traps
- Demonstrated understanding of the community services system
- Skills in phone intake, assessment and triage
- A knowledge of referral options and the ability to make specialised referrals in response to identified client goals
- Demonstrated time management skills
- Capacity to enter relevant, accurate and timely data
- A satisfactory Police Check
- A current Employee Working with Children’s Check (WWCC)

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### **Key Selection Criteria**

1. Demonstrated capacity to have effective, person-centred money conversations with a diverse range of people, including people with cultural, gendered, social and economically diverse backgrounds, who experience health concerns or disabilities, carer’s and people who have not previously accessed a community services system.
2. Demonstrated understanding of a trauma informed approach, including risk assessment and response to family violence and economic abuse.
3. Strong commitment to and capacity for teamwork, collaboration and networking.
4. Experience in liaison and referral with/to other community service employees.
5. Well-developed verbal and written skills with the ability to build effective and trusting relationships with people internally and externally.
6. Previous phone intake, assessment and triage experience

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### **Values & Behaviours**

We are all co-responsible for the delivery of the Good Shepherd Mission and living our values by modelling these behaviours in all that we do.

Value of each person | Reconciliation | Justice | Zeal | Audacity

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## **Additional information**

### **Employment is subject to:**

- Relevant Qualifications/Registration Name
- A current national Police Record Check
- A current Employee Working with Children Check (WWCC) or state equivalent
- Proof of the right to work in Australia

### **The above requirements will need to be supplied and verified prior to commencement**

Work Health and Safety (WH&S): All team members are required to carry out their duties in a manner that does not adversely affect their own health and safety and that of others by reporting all incidents and injuries as well as cooperating with any measures introduced in the workplace to improve WH&S.

**Pre-existing injury:** The person appointed to this position will be required to disclose any pre-existing injuries or disease that might be affected by employment in this position. This will assist the organisation in providing a safe work environment.

**Equal opportunity:** Good Shepherd is an equal opportunity employer. We recognise the rich diversity of people across Australia. We are committed to ensuring that our team is reflective of the diverse community we serve and to supporting a culture of equity, inclusion and diversity. All team members have a responsibility to be familiar with and adhere to the organisation's policies and procedures.

**Child Safe Employer:** Good Shepherd Australia New Zealand is a Child Safe employer. Employment is subject to satisfactory referee checks, a current employment working with Children Check, National Criminal History check and proof of the right to work in Australia.

**Cultural competency:** Good Shepherd strives to maintain a culturally competent and inclusive workplace. All team members are expected to undergo cultural competence training as part of their professional development plans.

**Salary packaging** is available to all employees.