

Position description

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| Title | Financial Inclusion Officer – Telephone & Online |
| Reports to | Team Leader – Telephone & Online |
| Classification & Salary | SCHCADS Level 4 (plus super & salary packaging benefits) |
| Employment Status | Full Time – Fixed Term, until 30 June 2023 |
| Primary Location | Hybrid – NSW offices & home location |
| Closing Date | July 2022 |

Good Shepherd Australia New Zealand (GSANZ)

Our three-year 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.

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

The T&O team deliver community finance products and services, including No Interest Loans, directly to clients. These products and services aim to improve the wellbeing and social inclusion of people who are disadvantaged and on low incomes.

This role is the initial point of contact for clients, assesses their needs and refers them appropriately, and delivers direct services (community finance products). This direct service delivery includes completing budgets and loan applications with clients.

It forms 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.

Key Responsibilities

- Receive and triage intake calls, show empathy and take a client-directed approach that empowers and supports a person while guiding them through the Good Shepherd finance options.
 - Respond to enquiries (phone and online), assess eligibility, determine client needs, and respond appropriately (this may be through providing direct services, information provision, or referrals to internal and external supports).
 - Assist people from diverse backgrounds with complex needs in a way that is respectful, appropriate, and professional.
 - Utilise known networks to provide information and make referrals to other support services, as required.
 - Assist clients with all aspects of loan applications, including conducting one-on-one interviews with clients, preparing a budget with them, and checking supporting documentation.
 - 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 accurate client records are kept using client databases and loan management systems.
 - Consult, refer and collaborate with other team members, including Hold & Connect, 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 in line 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

Qualifications, Experience and Mandatory Requirements

- Certificate or Diploma in Community Services, Diploma in Financial Counselling, or equivalent community services experience
- Experience in community service, financial counselling, or financial capability service delivery
- Experience working with complex clients or clients would be highly regarded

Employment is subject to:

- Relevant Qualifications/Registration Name
- A current Police Record Check
- A current Working with Children Check (WWCC) or state equivalent
- Proof of the right to work in Australia
- Evidence of Covid-19 vaccination, or medical exemption

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

Key Selection Criteria

1. Ability to establish rapport and support clients from diverse backgrounds and complex needs and provide efficient and high-quality client service
2. Demonstrated experience in uncovering and assessing client needs and matching these with appropriate services and referrals
3. Ability to articulate and work through relevant budgeting and numerical processes with clients.
4. Demonstrated computer skills, including Microsoft Office and use of client databases
5. Demonstrated ability to follow procedures, processes and compliance requirements whilst paying attention to detail
6. Ability to work under pressure through effective planning and prioritising and being flexible/ adaptive to change
7. The capacity and commitment to work in alignment with the values of Good Shepherd and understand the issue of financial exclusion in Australia
8. Well-developed verbal and written skills with the ability to build effective and trusting relationships with people internally and externally

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

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
- Evidence of Covid-19 vaccination, or medical exemption
- You may be required to obtain particular vaccines or immunisations in order to perform the Inherit requirements of this position. This includes but is not limited to the COVID-19 vaccine/immunisation

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.
