



Position Description

Accredited or Associate
Financial Counsellor

Date: 30 September 2024

Position:	Accredited-Associate Financial Counsellor
Work Area:	Human Services Division
Location:	Toowoomba, Warwick or Dalby
Classification Level:	Level 5
Industrial Instrument:	Lifeline Darling Downs and South West Queensland Limited Enterprise Bargaining Agreement (2024).

Reports to: Manager, Human Services Division

Purpose

- Provide financial counselling and consumer advocacy services across the Darling Downs, Lockyer Valley, Goondwindi, Balonne (St George), Maranoa and Warrego regions. Financial counselling services are aimed at providing information, options, support and advocacy to individuals and families who find themselves in financial difficulties, whether being for general or specialized financial counselling matters (Family Violence, Problem Gambling etc.).
- To ensure that financial counselling services are conducted in a high quality, professional and ethical manner.
- As a member of the greater Lifeline Darling Downs South West Qld Ltd (LDDSWQL) team facilitate the achievement of LDDSWQL philosophy, mission, strategy and its annual goals and objectives.

Key Responsibilities

- Work collaboratively with clients on debt and recovery issues.
- Work collaboratively with clients on budget development, superannuation, insurances and handling complex cases including bankruptcy and consumer investigation.
- Provide confidential, accurate and efficient data input and records management.
- Engage, advocate and refer effectively with target groups and key stakeholders, including creditors and traders.
- Represent LDDSWQL at relevant meetings and forums when required.
- Liaise with key internal staff across LDDSWQL.
- Engage with key external stakeholders and service providers.
- Deliver groups and workshops across service areas to support Financial Literacy initiatives as required.
- To ensure effective case management, intake, referral management and the maintenance of case records by:
 - a. Maintaining up-to-date statistics and data,
 - b. Ensuring appropriate recording and storage of client information
- Comply with the Agency's Quality Assurance requirements including processes for client and stakeholder feedback, evaluation and other requirements as specified by funding bodies, legislation and best practice.
- To attend and actively participate in regular line management and professional external supervision and training.

- This is a role that at times involves additional work outside of office hours to fulfil the duties of the position.

Key Selection Criteria

Essential:

- A Diploma of Community Services (Financial Counselling) or currently enrolled and working towards completion of a Diploma of Community Services (Financial Counselling).
- Current member of relevant State / Territory peak body relating to financial counselling and/or provision of financial services (i.e. Financial Counsellor's Association of Queensland) or demonstrated ability to meet membership criteria.
- Current "C" class drivers' licence.

Desirable:

- Demonstrated high level practitioner skills in the provision of quality financial counselling services to individuals and the ability to articulate a professional framework for financial counselling, including a working knowledge of the National Standards-Financial Counselling Australia, the Code of Ethics- Financial Counselling Australia and knowledge of statutory requirements relevant to the role.
- Demonstrated ability to communicate effectively with clients from diverse backgrounds including Aboriginal and Torres Strait Islander community and Culturally and Linguistically Diverse community members.
- Demonstrated understanding of the impact of past and current social and environmental factors that negatively impact the financial independence of individuals, families and communities.
- Demonstrated ability to communicate and negotiate effectively, both orally and in writing, at all levels within public and private sector environments.
- Proven ability to analyse problems, collate data and present outcomes and options for clients.
- Demonstrated ability in lodging and managing complaints with relevant ombudsman services on behalf of clients.
- Demonstrated ability to work autonomously and as a member of a small team to meet strict deadlines and commitments.
- Demonstrated understanding of and commitment to the principles and practices of Employment Equity, Ethical Conduct and Work Health & Safety.
- Demonstrated ability to proactively support the Values, Principles and Purposes of LDDSQWL.

Use of equipment:

- Computer equipment / Office 365
- Photocopier
- Microsoft Office Suite
- Mobile Telephone
- Telephone System
- Motor Vehicle

Other duties and responsibilities

- Works under general guidelines and established work procedures, however, required to exercise judgment and/or contribute critical knowledge and skills where guidelines and procedures are not clearly defined.
- Works under general direction. Apply knowledge and skills gained through qualifications and/or previous experience.
- Contribute to the development of work methods and setting of outcomes.
- Have a sound knowledge of program, activity, operational policy of the services performed by LDDSWQL.
- Ability to manage time, setting priorities, planning and organizing their own work.
- Liaise with other professionals, technical experts and stakeholders; Undertake a wide range of activities associated with service delivery.
- Develop, control and administer a records management system associated with the delivery of services.
- Liaise with clients to achieve appropriate outcomes and provide specialist technical advice.

Work Health & Safety

Employees are obliged to have knowledge of and comply with LDDSWQL's stated Work Health & Safety policies and procedures.

Equal Employment Opportunity

Employees are to uphold LDDSWQL's commitment to the principles of Equal Employment Opportunity & Diversity within the Workplace. LDDSWQL holds itself accountable to our Social Justice Charter, and related documents including our Reconciliation Action Plan (RAP) and Indigenous Employment Strategy.

Employees are to uphold LDDSWQL commitment to the principles of Equal Employment Opportunity and Affirmative Action within the Workplace.

Staff Training/Professional Development

LDDSWQL supports staff to undertake professional development and training activities as part of their work functions (informed by budgets). Employees are to discuss options with their respective supervisor/line manager in the first instance.

Note: *LDDSWQL employees, volunteers and work experience students are required to undertake screening checks and hold a positive notice.*

The CEO or their delegate will determine which positions will require a National Police History Check, NDIS Worker Screening Clearance and/or Working with Children Blue Card. Initial and continuing employment is dependent on all criminal history screening results being satisfactory to LDDSWQL. Consequently, LDDSWQL reserves the right to withdraw an offer of, and terminate employment.