

**ABOUT
US**

Primary Care Connect is a local community health centre operating under the social model of health. We work with our community to create better health outcomes. Visit our website www.primarycareconnect.com.au for the organisations mission, values, journey and strategic direction.

**POSITION
SCOPE**

The role of the Financial Counsellor is to provide high quality financial counselling services including education, information, support and advocacy to assist individuals in financial difficulty to address their financial problems and make informed choices.

The Financial Counsellor delivers services varying in intensity, duration and modality (face-to-face or telephone) based on an assessment of the client's presenting circumstances however, taxation and business advice is outside the scope of this position.

Position Reports

This position will report to the Executive Manager Integrated Services and works within the Financial Counselling Team. It is also expected that this position works within the larger Primary Care Connect team, and network with external organisations.

Key Performance Indicators

The key performance indicators below are the expected outcomes of this position. Timelines for achievement of key performance indicators will be set within the first month of employment and include clear objectives to be achieved throughout the probation period.

- 651 hours of service per financial year
- Meet 100% compliance for data collection and program evaluation
- Meet 100% reporting requirements in accordance file audits
- Meet 95% compliance for meeting with direct line manager and team
- Conduct yourself in accordance with Primary Care Connect core values and behaviours

Position Duties and Responsibilities

651 hours of service per financial year

- Assess the client's presenting issues and financial situation
- Assist clients to stabilise and improve their financial situation through the provision of advice, assistance and advocacy
- Assist in negotiating with creditors to reach acceptable agreements
- Assist clients to develop a budget plan to suit individual circumstances
- Assist clients to gain financial management skills to enable them to take control of their finances
- Complete reports as required by the agency and funding body and maintain statistical records
- Make appropriate referrals internally and externally
- Provide services to individuals, families and groups across the catchment area of Greater Shepparton, Moira and Strathbogie Local Government Areas
- Provide services of varying intensity and duration via telephone and face to face
- Actively network locally and regionally with other Financial Counsellors and other service providers
- Undertake the required tasks for ongoing membership of the Financial and Consumer Rights Council
- Undertake and successfully complete other duties as directed

Meet 100% compliance for data collection and program evaluation

- Recording and analysis of data to support the work of the program
- Collect and input data as per evaluation framework and plan
- Participate in program evaluations as directed by management
- Present information as directed by manager

Meet 100% reporting requirements in accordance file audits

- Complete all client documentation in line with client journey procedure
- Address any non-compliance from file audits within 24 hours of notification

Meet 95% compliance for meeting with direct line manager and team

- Attend monthly individual meetings with direct line manager
- Attend team and all-staff briefings
- Attend and report on meetings as directed by management

Conduct yourself in accordance with Primary Care Connect's core values and behaviours

- Be accountable for your own behaviour
- Support a high standard of professional respect
- Support an inclusive working environment

Incumbent Responsibilities

Qualifications	<ul style="list-style-type: none"> • Maintain relevant qualifications and professional registrations • Provide at commencement of employment a National Police Check, Drivers Licence and Working with Children Check
Personal & Professional Development	<ul style="list-style-type: none"> • Demonstrated experience, understanding and commitment of the need for both personal and professional development
Communications & Organisational Culture	<ul style="list-style-type: none"> • Excellent communication and interpersonal skills including demonstrated experience in liaising with a wide range of internal and external clients
Administration & Documentation	<ul style="list-style-type: none"> • Ability to thoroughly use PCC's policies and procedures to ensure that all administration and documentation requirements are initiated and completed in a professional and timely manner
Technical Skills & Application	<ul style="list-style-type: none"> • Demonstrated knowledge and application of the skills, duties and responsibilities required for this position. This includes knowledge and understanding of appropriate equipment, legislation, policies and procedures
Team Work & Communications	<ul style="list-style-type: none"> • Demonstrated ability to participate as an active member of a team, consistent with PCC's policies and procedures
Continuous Quality Improvement	<ul style="list-style-type: none"> • Commitment to ensuring that quality services are delivered to both internal and external clients

Key Selection Criteria

These are the key selection criteria for this position. Please address these in your application, providing relevant work examples of each criteria.

- Diploma of Community Development (Financial Counselling) or Equivalent undergraduate financial qualifications and counselling training or experience
- Eligibility for full membership of the Financial and Consumer Rights Council
- Demonstrated ability to provide assessment and case management to individuals
- An understanding of relevant Acts relating to credit provision, debt collection and Bankruptcy
- Skills in recognition of other issues requiring referral to other workers
- Experience in planning, delivering and evaluating groups and programs
- Ability to maintain client documentation including care plans, case notes and statistics
- Ability to self-manage a complex workload, handle multiple tasks, prioritise and delegate where necessary to meet prescribed timeline with available resources
- High level of communication and interpersonal skills
- Experience using technology to complete daily work tasks
- Professional and personal alignment with Primary Care Connect core values

Position Employment Conditions

Agreement:	Community Health Centre (Stand Alone Services) Social and Community Service Employees Multi Enterprise Agreement 2017
Classification:	Community Development Worker
Hours per Fortnight:	37.5
Probation Period:	All new positions are subject to a probation period of six months from date of commencement.

Position Approval

The details contained in this position description are an accurate statement of the scope, conditions, duties, responsibilities and all other requirements of above titled position.

Chief Executive Officer

_____/_____/_____
Date

I _____ (full name) have read and fully understand the requirements of the positions and will fulfil the obligations of scope, duties and responsibilities as listed in the above position description.

Incumbent

_____/_____/_____
Date