

# Position Description

## Financial Mentor - Dunedin

### Mission

We walk with people across the generations to create together places to live, learn and thrive. We call out injustice and advocate for positive social change.

### POSITION PURPOSE AND PRIMARY OBJECTIVES

#### Purpose

Financial Mentors support whānau and individuals through providing immediate support where required, helping them to work through challenging financial situations through setting financial goals and sharing healthy financial skills so they build confidence to take control of their finances and financial future.

#### Primary Objectives

- To support whānau and individuals presenting in financial crisis
- To assess client need, both immediate and longer term (including setting financial goals)
- To support clients to address any on-going chronic financial challenges.
- To assist in organising or delivering specialist interventions including advocacy on their behalf if required
- Share healthy financial skills so whānau and individuals can build confidence to take control of their finances and financial future.

#### Accountability

#### Expected Outcomes / Key Performance Indicators

#### Relationship Building, Teamwork

- Develop effective relationships across the organisation particularly within the Family Works Team.
- Develop effective relationships with external agencies, organisations, and customers.
- Ensure information is shared appropriately, and assistance, support and cooperation are regularly offered and provided to the Family Works team.

	<ul style="list-style-type: none"> <li>• Actions and behaviours encourage and support the whole Family Works team.</li> <li>• Communicate effectively and promptly with all managers and key staff.</li> <li>• Support and encourage commitment towards the 'one team' philosophy across Presbyterian Support Otago.</li> </ul>
<b>Personal Effectiveness</b>	<ul style="list-style-type: none"> <li>• To be highly productive and well organised to ensure that all job outcomes are completed to a high standard and on time.</li> <li>• To be able to deliver on outcomes promised.</li> <li>• Ensure confidentiality is maintained in all situations.</li> <li>• Ensure personal views do not impact on the ability to carry out functions of the role effectively.</li> <li>• To be well presented and punctual on all occasions.</li> <li>• Ensure behaviour or actions do not adversely affect personal or professional credibility in the role.</li> <li>• Regularly reflect on personal effectiveness in the role and identify ways to improve individual performance.</li> </ul>
<b>Service Improvement and Planning</b>	<p>Under the direction of the Team Leader / Practice Manager:</p> <ul style="list-style-type: none"> <li>• Be involved in planning and co-ordination of identified projects, meeting specific deadlines effectively.</li> <li>• Implement actions to achieve agreed organisational and operational needs.</li> <li>• Ensure effective communication strategies are used to support staff to follow the most effective course of action.</li> <li>• Have the ability to manage multiple complex issues / situations effectively.</li> <li>• Have attention to detail and excellent analytical and problem-solving ability and demonstrate this when thinking through potential options and solutions to issues.</li> <li>• Proactively and on an ongoing basis identify the need for change, analyse the issues and provide guidance on the most appropriate solutions and proposals.</li> <li>• Be involved in Family Works Service planning for positive service outcomes.</li> </ul>
<b>Maintain Professional Development</b>	<ul style="list-style-type: none"> <li>• Attain and/or maintain accreditation with FinCap as a financial mentor.</li> </ul>

	<ul style="list-style-type: none"> <li>• Maintain an awareness of current developments in the building financial capability and social service environment.</li> <li>• Identify personal development needs as they arise and through active participation in the annual Performance Development process (PDP).</li> <li>• Attend appropriate in-service and external training as is relevant to the role and as set through the agreed PDP.</li> </ul>
<p><b>Providing clients with client centred financial mentoring and support</b></p>	<ul style="list-style-type: none"> <li>• Ensure client support is culturally responsive and recognises the individual needs for all, including Māori, Pacific, ethnic communities, and other diverse communities.</li> <li>• Ensure services are provided in a way that is consistent with social, economic, political, cultural, and spiritual values.</li> <li>• Ensure clients individual and whānau needs are prioritised when developing a strengths-based financial plan.</li> <li>• Ensure clients individual and whānau basic needs are prioritised and protected (i.e. access to housing, power, and food).</li> <li>• Ensure immediate financial or any other crisis situations are prioritised and managed effectively.</li> <li>• Ensure clients have confidence to assess and access appropriate financial products when needed.</li> <li>• Ensure clients are supported to reduce debt where appropriate and able.</li> <li>• Ensure support provided strengthens the longer-term financial capability of clients through (but not limited to) <ul style="list-style-type: none"> <li>• setting financial goals,</li> <li>• increasing financial confidence and competence,</li> <li>• developing healthy and robust financial decision-making skills</li> <li>• effective management of finances,</li> <li>• awareness of and smart use of debt and financial products,</li> <li>• increasing knowledge of support available,</li> <li>• awareness and/or involvement in resource or income generating activities.</li> </ul> </li> <li>• Ensure any additional identified needs of clients are appropriately managed and responded to through referrals to other supports either internally through Family Works, or external agencies and/or support groups.</li> </ul>

	<ul style="list-style-type: none"> <li>• Ensure clients are provided with accurate and current information in a timely manner when required and/or requested.</li> <li>• Ensure there is professional, accurate and timely record keeping in line with Family Works practice.</li> </ul>
<b>Other Duties</b>	<ul style="list-style-type: none"> <li>• Undertake other duties as requested by and mutually agreed with the Team Leader / Practice Manager to meet business needs of Family Works.</li> </ul>

### Expectations of all PSO Employees

<b>Communications / Interpersonal relationships</b>	<ul style="list-style-type: none"> <li>• Positive and collegial relationships are developed and maintained.</li> <li>• Verbal and written communication is of a high standard, relevant and appropriate to the audience.</li> </ul>
<b>Performance development and learning</b>	<ul style="list-style-type: none"> <li>• Active engagement with personal development review process.</li> <li>• Personal and professional development goals and objectives are established.</li> <li>• Be responsible for own ongoing education and skills required in designated role.</li> </ul>
<b>Continuous improvement</b>	<ul style="list-style-type: none"> <li>• Make recommendations for improvement to services, work practices and / or workflow.</li> </ul>
<b>Health and Safety</b> <i>PSO is committed to achieving the highest level of health and safety for its staff and everyone has health and safety responsibilities.</i>	<ul style="list-style-type: none"> <li>• All employees are expected to identify, report and where appropriate resolve issues that may cause harm to themselves or others in the organisation.</li> <li>• You are expected to work safely and to actively participate in health and safety programmes in your work area.</li> <li>• All accidents or potential hazards must be reported to your direct line manager.</li> </ul>
<b>Te Tiriti O Waitangi / The Treaty of Waitangi</b> <i>PSO is committed to its obligations under Te Tiriti o Waitangi / the Treaty of Waitangi.</i>	<ul style="list-style-type: none"> <li>• As an employee you are required to give effect to the articles as well as the principles of Te Tiriti o Waitangi / the Treaty of Waitangi – Partnership, Participation and Protection.</li> </ul>

### Relationships

<b>Reports to:</b> Dunedin Team Leader	<b>Direct Reports:</b> None
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<p><b>Internal Relationships:</b>  Family Works Practice Manager – Dunedin  Family Works General Manager  Family Works Staff  PSO Staff</p>	<p><b>External Relationships:</b>  All Service Stakeholders</p>
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## Person Specifications

**Work Qualifications / Skills**

- High level of competency in literacy and numeracy.
- Preference for Financial Mentor accreditation and/or previous experience as a financial mentor or budget advisor
- Skills and experience in use of computer systems and databases to maximise the use of technology for improved service provision.
- Drivers licence is essential

**Experience/ Knowledge**

- Ability to understand core budgeting / financial concepts and the wider impact for individuals and whānau.
- Ability to demonstrate exceptional planning and organisational skills.
- The ability to manage complex and competing priorities effectively, and with professional maturity and empathy.
- Understanding of the social and economic complexities that exist within the community.
- Be able to communicate clearly both verbally and in writing.

**Personal Qualities**

- Possesses highly developed interpersonal skills including relationship and advocacy skills.
- Have the ability to work autonomously, but also as part of a small team connected to another larger team across the Otago region.
- Ability to coordinate and facilitate or co-facilitate groups as necessary.
- Professional maturity to manage sensitive and confidential information, and to act with respect and integrity.

**Physical Requirements**

This role may involve standing, walking, bending, sitting, climbing stairs, simple grasping, fine manipulation, operating machinery equipment, lifting, overhead reaching, carrying, pushing/pulling, twisting, climbing balancing, crouching, squatting and other reaching.

## Working Together

**Our Work**

- **We are person centred in our organisation.**
- **We strive always to do better, to work hard and to the best of our ability.**
- **Each person knows they make a difference, and they feel valued because of this.**

### **Our Organisation**

- We are committed to delivering on the organisation direction and values.
- We are responsible and accountable for our actions and behaviours.
- We are committed to positive, proactive leadership.
- Each person is empowered to succeed, with the orientation and on-going support needed.
- Expectations are communicated clearly and understood by each team member, through team meetings, regular and timely feedback, and annual appraisals.

### **Our Team**

- We share and learn from each other; are open and honest, support and cooperate with each other, and do the right thing at the right time.
- We should each other accountable by giving and receiving constructive feedback.
- Our relationships are based on mutual respect, by treating each other as we wish to be treated. We are courteous and responsive.
- We affirm each person as a valued member of the team by giving each other positive reinforcement.

## **Values**

**Founded in our Christian faith we act with the values of integrity, respect, courage, manaaki and aroha.**

