



# Position Description

## Intern Financial Counsellor

Community and Family Care

August 2025

### Agreement

---

Signed - Manager

---

Signed - Employee

---

Date

---

Date

**Do all the good you can**  
because every life matters



# Financial Counsellor

## 1. Overview of Wesley Mission

Wesley Community Services Limited, a company limited by guarantee pursuant to the Corporations Act 2001, is a Public Benevolent Institution operating as Wesley Mission to deliver services and programs to provide direct relief of poverty, sickness, suffering, distress, adversity, disability, destitution, and helplessness in New South Wales and other parts of Australia as inspired by the work of Jesus Christ in word and deed. Our vision is to:

“Do all the good you can, by all the means you can, in all the ways you can, in all the places you can, at all the times you can, to all the people you can, as long as ever you can”.

Out of Christian love and compassion we are driven by Christlike servanthood, unfailing integrity and courageous commitment.

The organisational plan is based on four key result areas, namely:

- our clients
- our people
- our operations
- our financials

Our position descriptions and performance plans are aligned with these four key result areas.

## 2. Overview of Community and Family Care

Wesley Mission's Community and Family Care teams build resilience and strengthen capacity in the local communities where we work. We will provide front line care to people (within NSW) who seek our services on a voluntary basis. We will support people using trauma-informed person-centred approaches in a holistic manner. We will actively seek to “Do All the Good We Can, By All the Means We Can, In All the Ways We Can,” for the whole of community. We are committed to local communities, the traditional owners, the new arrivals, the local people and Wesley's meaningful presence within the local space. We are committed to finding ways to support and address the local un-met need. We will identify and respond to hidden and emerging needs in our local communities.

The main areas in Community and Family Care are:

- |                               |                                    |
|-------------------------------|------------------------------------|
| • Financial Counselling       | • GambleAware Counselling          |
| • Targeted Early Intervention | • GambleAware Helpline             |
| • Young Healthy Minds         | • Emergency Relief                 |
| • Family Preservation         | • Specialist Homelessness Services |
| • Youth Outreach              | • Care Finders                     |
| • Executive Management team   |                                    |



### 3. Overview of role

Wesley Financial Counselling is a free, face-to-face, confidential counselling service that provides comprehensive, specialist counselling support to eligible people in order to address the immediate distress caused by financial hardship and enable our clients to build a longer- term capability to budget and manage their money better and make informed financial decisions in the future.

Wesley Financial Counselling provides support to people who:

- have financial concerns or wish to avoid such worries in the future
- cannot meet their financial commitments
- are spending more than they earn
- require help to manage family finances
- need advice on money management and budgeting

With the support and oversight of experienced financial counsellors, Wesley Mission Intern Financial counsellors will be provided with the opportunity to develop their financial counselling skills and knowledge through on-the-job learning, whilst completing their Diploma.

This position is for a 12-month contract for Intern Financial Counsellor

This position works in accordance with SCHADS 3 characteristics (attachment A)

### 4. Relationships

Reports to: Team Leader, Financial Counselling & Emergency Relief

### 5. Major role responsibilities

#### 5.1 Our clients

- ensure every interaction with clients and potential clients is underpinned by the principles of unconditional positive regard
- Provide intake and triage support, so that clients experience a seamless, timely and professional pathway into our service
- provide Wesley Missions developed 'In Charge of my Money' financial literacy program to high risk groups within our community/education settings.
- Provide administrative support to an allocated experienced Financial Counsellor
- Participate in face-to-face counselling sessions, in line with the requirements of FCAN, funding bodies and WM policy and procedures
- Provide EAPA and AGL phone assessments
- promote the 'In Charge of my Money' financial literacy education program in the community
- open and maintain up-to-date client files in accordance with Wesley Counselling Service practice standards
- Actively engage with local communities as well as first point of access services in order to understand the needs of the community and identify areas of opportunity.



### **5.1.1 Performance Measures**

- 90% clients report initial point of contact was positive
- CRM database up to date and accurate for allocated clients
- Delivery of 4 Financial literacy programs
- Min 5 EAPA assessments per week
- Evidence of proactive engagement with communities

### **5.2 Our people**

- be a part of creating a team culture of support and respect
- active engagement with financial counselling diploma studies
- complete Wesley Mission induction and orientation program and mandatory training
- identify and recommend opportunities to increase team satisfaction
- participate in daily client debrief sessions with allocated Wesley mission supervisor
- attend and participate in monthly support meetings, team meetings and case conferences
- attend and participate in annual Employee Contribution & Development process
  - continue tracking achievement of goals, documenting your progress on the Employee Contribution & Development template
- commit to a continuing process of personal self-development, training and skills acquisition
- maintain FCAN registration
- ensure all policies and procedures are understood and adhered to,
- attend Life of the Mission events as advised by supervisor – there is an expectation that all staff will attend Wesley's Thanksgiving Service on the first Sunday in December
- promote and ensure adherence to Wesley Mission brand
- ensure all Human Resource (HR) policies and procedures are understood and adhered to
- regularly report to your supervisor on team issues such as resourcing needs, performance, training/development, disciplinary action, leave, Work, Health & Safety issues etc

### **5.2.1 Performance Measures**

- successful completion of financial counselling diploma within 12 months of commencement
- completion of all mandatory Wesley mission training
- attendance at Wesley Thanksgiving Service and other Life of the Mission events
- 90% attendance at team meetings and case conferences
- 95% attendance monthly line support meetings, including probation meetings and daily debriefs



### **5.3 Our operations**

- actively promote our service within local communities
- develop professional relationships with local service providers to encourage referral pathways
- ensure the reputation and integrity of Wesley Mission is maintained at all time
- contribute to program performance monitoring through reporting systems leading to measurable accountability as required by Funding bodies
- advocate and communicate the Wesley Mission brand and key messaging strategy to stakeholders, ensuring brand compliance and use of correct templates
- contribute to reviewing internal systems including policies and procedures to ensure more efficient and effective methods of delivery and to ensure continual improvement
- contribute to evaluation and quality improvement of programs
- as an employee, be responsible under the Work Health & Safety Act for the health and safety of all persons you come into contact with, during employment. Perform WHS tasks as directed by supervisor
- maintain industry specific standards and ISO9000 standards as per Wesley Mission's quality assurance policies
- promote the grievance procedure to all clients and respond in line with the Wesley Mission Grievance Procedure.

#### **5.3.1 Performance measures**

- Number of local network/interagency meetings attended
- achieved working knowledge of:
  - funding specifications and guidelines
  - Wesley Mission employee handbook
  - relevant policy and procedures
  - relevant databases

### **5.4 Our financials**

- Wesley resources are maintained and serviced as required

#### **5.4.1 Performance Measures**

- Allocated Wesley resources are well maintained including centers, vehicles and other equipment



## 6. Professional responsibilities

- participate in other activities to support the delivery of the Wesley Community and Family Care Business Plan and Wesley Mission Strategic Plan, as requested by your manager
- as an employee, be responsible under the Work Health & Safety Act for the health and safety of all people they come into contact with, during employment. All hazards and injuries must be reported through the normal process as set out in Wesley Mission's Work Health, Safety and Rehabilitation Quality Management System and site procedures
- in relation to Wesley Mission and the Uniting Church in Australia, attend such functions, meetings, seminars, training courses as directed by your supervisor
- in relation to Wesley Mission attend worship services as encouraged by your supervisor
- take responsibility for personal career development and training
- participate in Wesley Mission's Orientation program, so as to gain an understanding of, and promote, the application of the EEO, Affirmative Action, Privacy Act, Work Health & Safety Act and other relevant legislation
- administer Wesley Mission's philosophy of care and other relevant policy documents as appropriate
- demonstrate responsible stewardship of all resources, and willingness to report impropriety in keeping with the values of Wesley Mission
- ensure the reputation and integrity of Wesley Mission is maintained at all times
- ensure all data collection and reporting is timely and in line with funding body and organisational requirements
- practices within the guidelines described in the Code of Conduct and Ethics and other Statutory requirements
- demonstrates an understanding and strict compliance with the protocols, policies and procedures concerning privacy, dignity and confidentiality



## 7. Selection criteria

To be successful in this position, candidates must possess the following:

### Essential demonstrated behaviours

- willingness to affirm Wesley Mission's vision, mission and values and enthusiastically advocate our Word and deed ministry
- demonstrated ability to work unsupervised as well as an effective team player with a positive can-do attitude
- relates well to a range of people with sound listening and problem-solving skills
- displays unconditional positive regard during all workplace interactions
- confident professional attitude with strong initiative
- displays emotional maturity and resilience
- passion for supporting vulnerable and in need individuals
- dedication to developing strong relationships with local community
- willingness to learn and accept feedback

### Essential skills/knowledge

- willingness to affirm Wesley Mission's vision, mission and values
- completing or willing to complete Diploma in Financial Counselling
- holds or willing to obtain, Trainee Associate membership – Financial Counsellors Association of NSW
- computer literacy
- excellent time management, multi-tasking and follow up skills
- excellent verbal and written skills
- understanding the importance of family / community eco systems
- current Working with Children Check or willing to obtain
- current NSW drivers' licence
- fully vaccinated against COVID 19

### Desirable criteria

- an interest in and/or knowledge of problem gambling issues
- welfare industry background and / or training
- experience and/or competency in delivering community education programs



## Attachment A

# Social and community services employee level 3

### Characteristics of this level

- A person employed as a Social and community services employee level 3 will work under general direction in the application of procedures, methods and guidelines which are well established.
- General features of this level involve solving problems of limited difficulty using knowledge, judgment and work organisational skills acquired through qualifications and/or previous work experience. Assistance is available from senior employees. Employees may receive instruction on the broader aspects of the work. In addition, employees may provide assistance to lower classified employees.
- Positions at this level allow employees the scope for exercising initiative in the application of established work procedures and may require the employee to establish goals/objectives and outcomes for their own particular work program or project.
- At this level, employees may be required to supervise lower classified staff or volunteers in their day-to-day work. Employees with supervisory responsibilities may undertake some complex operational work and may undertake planning and co-ordination of activities within a clearly defined area of the organisation including managing the day-to-day operations of a group of residential facility for persons with a disability.
- Employees will be responsible for managing and planning their own work and that of subordinate staff or volunteers and may be required to deal with formal disciplinary issues within the work area.
- Those with supervisory responsibilities should have a basic knowledge of the principles of human resource management and be able to assist subordinate staff or volunteers with on-the-job training. They may be required to supervise more than one component of the work program of the organisation.
- Graduates with a three-year degree that undertake work related to the responsibilities under this level will commence at no lower than pay point 3. Graduates with a four-year degree that undertake work related to the responsibilities under this level will commence at no lower than pay point 4.

### Responsibilities

To contribute to the operational objectives of the work area, a position at this level may include some of the following:

- undertake responsibility for various activities in a specialised area
- exercise responsibility for a function within the organisation
- allow the scope for exercising initiative in the application of established work procedures
- assist in a range of functions and/or contribute to interpretation of matters for which there are no clearly established practices and procedures although such activity would not be the sole responsibility of such an employee within the workplace
- provide secretarial and/or administrative support requiring a high degree of judgment, initiative, confidentiality and sensitivity in the performance of work
- assist with or provide a range of records management services, however the responsibility for the records management service would not rest with the employee
- proficient in the operation of the computer to enable modification and/or correction of computer software systems or packages and/or identification problems. This level could include systems administrators in small to medium sized organisations whose responsibility includes the security/integrity of the system
- apply computing programming knowledge and skills in systems development, maintenance and implementation under the direction of a senior employee
- supervise a limited number of lower classified employees or volunteers
- allow the scope for exercising initiative in the application of established work procedures
- deliver single stream training programs
- co-ordinate elementary service programs





- provide assistance to senior employees
- where prime responsibility lies in a specialised field, employees at this level would undertake at least some of the following:
  - undertake some minor phase of a broad or more complex assignment
  - perform duties of a specialised nature
  - provide a range of information services
  - plan and co-ordinate elementary community-based projects or programs
  - perform moderately complex functions including social planning, demographic analysis, survey design and analysis.
  - in the delivery of disability services as described in subclauses **Error! Reference source not found.** or **Error! Reference source not found.**, taking overall responsibility for the personal care of residents; training, coordinating and supervising other employees and scheduling work programs; and assisting in liaison and co-ordination with other services and programs.

### **Requirements of the job**

Some or all of the following are needed to perform work at this level:

#### **Skills, knowledge, experience, qualifications and/or training**

- thorough knowledge of work activities performed within the workplace
- sound knowledge of procedural/operational methods of the workplace
- may utilise limited professional or specialised knowledge
- working knowledge of statutory requirements relevant to the workplace
- ability to apply computing concepts

#### **Prerequisites**

- entry level for graduates with a relevant three-year degree that undertake work related to the responsibilities under this level - pay point 3
- entry level for graduates with a relevant four-year degree that undertake work related to the responsibilities under this level - pay point 4
- associate diploma with relevant experience; or
- relevant certificate with relevant experience, or experience attained through previous appointments, services and/or study of an equivalent level of expertise and/or experience to undertake the range of activities required.

#### **Organisational relationships**

- graduates work under direct supervision
- works under general supervision except where this level of supervision is not required by the nature of the responsibilities under 0 being undertaken
- operate as a member of a team;
- supervision of other employees.

#### **Extent of authority**

- graduates receive instructions on the broader aspects of the work;
- freedom to act within defined established practices;
- problems can usually be solved by reference to procedures, documented methods and instructions.
- Assistance is available when problems occur.