Wellington City Mission (WCM) is a faith-based community organisation that has been supporting those in need through the provision of a range of social services in the Wellington region for 116 years.

Our vision is: People and communities Empowered, Transformed, Experiencing Fullness of Life.

***Reports to:*** Community Programmes Manager (Programme Manager)

***Primary role and purpose:*** Financial mentors provide advice and support to anyone who is struggling with debt, or who wants to plan for the future.

A typical budgeting session involves a financial mentor helping to set goals and making a financial plan that can help to be developed into a strong budget.

***Person Specification:*** An ideal candidate will have the following attributes:

**Skills, Experience and Knowledge Required**

* Demonstrated budgeting advice, preferably with a range of clients with various levels of difficulty with their personal situations.
* Demonstrated experience in managing challenging people situations.
* Well developed communication skills.
* A demonstrated commitment to the provision of quality services.
* Honesty, integrity and an understanding of the significance of confidentiality.
* Competent in Microsoft Office applications.

***Hours of Work:*** This is a full-time position working 37.5 hours per week Monday to Friday, 8.30am to 4.30pm.

***Position Location:*** This role is located at Community Services in Newtown, Wellington.

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***Key Relationships:***

*Community Programmes Manager Guidance, support and direction*

*All Wellington City Mission staff Professional support and team work*

*Service Users Service provision, support and guidance*

*Relevant Government and community organisations Networking and support*

*Relevant referral agencies and personnel Networking and support*

Financial mentors provide more than budgeting. They provide a one-on-one service focusing on empowering people to get control of their money. They work alongside a person, their family and whānau, building trust and taking into account the complexity of their needs.

Financial mentors have a non-judgemental approach and sound financial knowledge. They support people to make connections with local networks and social services to ensure they get the right support at the right time (these can include Work and Income, support services for mental health, addictions, housing, etc.).

| ***Areas of responsibility*** | ***Expectations and Outcomes*** |
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| **Budgeting Service** | * Meet with all assigned service user’s to: * identify the level and nature of debt * Determine the ‘type’ of budgeting the service user will need: * one-off financial mentoring session with a financial mentor * financial mentoring - ongoing * Total Money Management * Maintain accurate, legible service user files and ensure they are available for the service user to view if required. * Support a client and their family/whānau to develop a focused [Financial Plan of Action](https://www.msd.govt.nz/what-we-can-do/providers/building-financial-capability/the-financial-plan-of-action.html) to get control of their financial lives. * Supports and empowers clients to navigate the system to control debt by negotiating reduced payments or generating additional resources. * Advocates on a client’s behalf as they are often too stressed to negotiate with creditors or other lenders on their own. * Maintain regular contact with service user’s, providing information, coaching and support in assisting service user’s to manage their own debt level and future financial management. * Review and update service user’s files regularly. * Advocate with key agencies for and on behalf of service users as and when appropriate. * Liaise with the Foodbank Coordinator and other WCM staff as necessary for service user support. * Provide one-on-one budget education and coaching as appropriate. * Assess whether a client may benefit by sharing and learning in group support such as MoneyMates. |
| **Meetings / liaison / Networking** | * Attend staff and team meetings as required. * Attend internal supervision with the Community Programmes Manager, as requested. * Attend external supervision, as agreed with the Community Programmes Manager. * Establish and maintain contact with: * relevant Government agencies * relevant community organisations * relevant specialist services applicable to the service user’s needs * Liaise with other agencies, organisations and creditors who may also be involved in the service user’s financial management process. |
| **Administration** | * Ensure all required paperwork is accurate and is forwarded to the Community Services Administrator in the time frames requested. * Provide a monthly report to the Community Programmes Manager, and to include monthly statistics and service user outcomes achieved. * Regularly update current knowledge and information of the work of other Budget Services, current legislation and Work and Income NZ (WINZ) benefits. |
| **Health and Safety** | The employee will follow the employer’s health and safety rules and procedures. Failure to follow reasonable health and safety rules may be considered serious misconduct.   * The employee will take reasonable care to look after their own health and safety at work, their fitness for work, and the health and safety of others. * Adhere to WCM policies and procedures, including health and safety best practice and appropriate legislation. * Follow all reasonable health and safety rules and instructions. * Participate in health and safety discussions. * Exercising their right to refuse to do unsafe work. * Taking reasonable care that their actions (or inactions) do not cause harm, or risk of harm, to themselves or others. * Not reporting for duty under the influence of alcohol or drugs that impair their performance or fitness for work. * Wearing all necessary personal protective equipment and clothing. * The employee must report any potential risks, incidents and near misses so the employer can investigate, and eliminate or minimise harm or risk of harm. |

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| LEVEL OF AND LIMITATIONS ON AUTHORITY |

1. Authority to expend funds is at the discretion of the Programme Manager and/or General Manager, Operations. Receipts must be obtained for all expenditure.
2. The Programme Manager and/or General Manager, Operations must be consulted on all issues that have significant implications for the provision of support services to service users and for Wellington City Mission overall.
3. Any tasks and expected results specified in the job description may be delegated to other staff, after consultation with the Programme Manager. The Programme Manager is responsible for ensuring that the expected results are achieved.

Competencies

1. Integrity: Works in a confidential environment, and actively demonstrates sensitivity to diversity such as culture, age, ethnicity and gender.
2. Customer Service Orientation: Provide a quality service and ensure a high standard of professionalism at all times.
3. Judgement/Decision-making: Considers all relevant information to draw a reasonable and appropriate conclusion.
4. Initiative: Ability to work without direct supervision; being proactive and self-motivated.
5. Flexibility: Maintains effectiveness while adjusts to a changing work environment, varying tasks, people, responsibilities and priorities
6. Relationship Building: Proactively develops and maintains effective internal and external relationships to facilitate the achievement of work goals.
7. Communication: Excellent listening skills and ability to express information, thoughts and ideas in a clear and appropriate manner.
8. Planning and Organising: Formulates a method or course of action for self and/or others to follow; sets priorities.
9. Personal Leadership: Working towards personal goals and achievements.
10. Results Orientation: Works through each aspect of a task or project and drives through to completion.