

CAMBRIDGE COMMUNITY HOUSE TRUST

Position Description

Position

Title: Budget Advisor

Role: Providing budget advice, money management skills and supervision

Location: Community House, 193 Shakespeare Street, Cambridge

Responsible

to: The General Manager of the Cambridge Community House Trust

Accountable

to: The Cambridge Community House Trust

Purpose of

the Position: Working with individuals and family/whanau in Cambridge and surrounding district, to provide budget advice and build money management skills

Working Relationships:

- General Manager of the Cambridge Community House Trust
- Staff of the Cambridge Community House Trust
- Staff/Volunteer Budget Advisors
- Clients
- Community
- WINZ
- Creditors, banks, businesses, government agencies involved with financial affairs of the client
- FINCAP

Required Knowledge and Skills:

- Excellent listening and interviewing skills
- A non-judgemental attitude
- Ability to integrate the principles of Te Tiriti o Waitangi into practice
- Cultural and ethical safety
- Ability to relate to people of all ages and from diverse backgrounds
- Ability to communicate effectively – face to face, telephone, written and email
- Positive and enthusiastic attitude
- Reliable, well organised and self managed
- An ability to perform arithmetic
- Preferably Money Mates experience
- Proficient in the use of information technology, especially Outlook email and calendar, Word, Excel and preferably Client Voices

- Ability to develop cash flow spreadsheets
- Ability to work in and contribute to a team environment
- An ability to maintain confidentiality
- A commitment to working within guidelines and Code of Ethics
- Broad knowledge of financial, legal and social support agencies and resources

Qualifications:

1 to 5 years experience
 BAIC certification
 Certified financial mentor
 Preferably certified to supervise

Key Responsibilities & Accountabilities:

- To assess a client's financial situation and determine short and longer term goals
- To prepare a budget, a debt schedule and a cash flow projection
- To meet regularly with the client to supervise maintenance of the plan, negotiate any changes and monitor progress
- To provide education and support to the client and family
- To assess risk to client and others, and respond in accordance with agency risk management policies
- Treat all people with respect and dignity, without discrimination
- To ensure all clients are treated in confidence and in a manner helpful and appropriate to the client
- Maintain confidential and up to date client records
- Comply with agency policy and procedures and statutory requirements
- Attend on-going education, professional development and training appropriate to the role as approved
- Attend peer and professional supervision
- Consult and liaise with General Manager, other advisors and other staff as required
- To participate in staff and team meetings, provide peer and collegial support
- To work professionally and collaboratively with staff, management, other financial organisations, community partners and government agencies
- Ensure all reporting requirements are met on a timely and regular basis
- To develop and maintain resources and information for the services

Performance Indicators:

- ✓ The values and philosophies of the organisation are promoted and upheld
- ✓ Practice is informed by a strength-based perspective
- ✓ Evidence of working in partnership with clients and whanau
- ✓ Clients are included in the decisions about their budgeting, goals and objectives
- ✓ All clients will receive a realistic and agreed budget with short term goals and long term objectives, within the first three interview sessions
- ✓ Clients' needs are respected
- ✓ Confidentiality is maintained
- ✓ Appropriate resources and services have been accessed for clients
- ✓ Appropriate and confidential records are kept on clients
- ✓ Evaluations from clients will indicate satisfactory or better outcomes in all areas
- ✓ Work is completed to a professional standard and in a timely manner
- ✓ Reporting for clients, agency, referrers and funders completed as required
- ✓ Regular communication with the manager and other staff is maintained
- ✓ Attendance at staff, peer meetings, supervision and training is maintained
- ✓ A proven commitment to participating in ongoing education, professional development and training
- ✓ Appropriate dress code is adhered to

Person Specifications:

- A good understanding of money management skills and a willingness to impart this knowledge
- Ability to relate and be culturally aware and sensitive to people from all backgrounds
- Demonstrated commitment to the Treaty of Waitangi
- Ability to work professionally and ethically, with honesty and integrity
- A non-judgemental, positive and enthusiastic attitude towards clients, staff and community
- A professional relationship towards colleagues and others
- Self-awareness, knowledge of own limitations and the ability to seek support when required
- A commitment to providing a quality service
- Good communication skills, both oral and written
- An ability to work independently and as part of a team
- Ability to manage time competently and plan independently

- Awareness of other services in the community
- Awareness and understanding of relevant legislation and policy
- A willingness to continue learning
- A commitment to quality delivery of service

NOTE: This job description is not intended to be all-inclusive. Employee may be asked to perform other related duties, as negotiated with the General Manager, to meet the ongoing needs of the organisation.

Job Description Approved.

General Manager Signature: Date:

Staff Member: Date:

Revision Date: