

Financial Mentor Advisor Position Description

Position title	Financial Mentor Advisor
Reports to	Chief Executive
Date	25 March 2021

Position Description

The position is focused on the nationwide workforce of around 800 Financial Mentors, formerly known as Budget Advisors. It will establish and deliver 20 communities of practice and develop the FinCap knowledge hub Te Papa Hou, for their access and to support in the building of their professional expertise. This role for Financial Mentors is complementary to the training and professional development programmes they undertake.

The Advisor will:

1. Develop, establish and facilitate 20 **Communities of Practice for Financial Mentors**, linked by geographic location or common skill or interest, which meet virtually or in person.
2. Ensure that **information on the operation** and activity of Communities of Practice is available to providers, financial mentors and stakeholders.
3. Enrich the **data** collected and recorded on financial mentoring services to ensure that the potential for Communities of Practice can be identified and progressed.
4. Ensure that opportunities for promoting **advocacy skills and activity** are integrated into the operation of all Communities of Practice.
5. Further develop the **knowledge hub Te Papa Hou** with, for example, cases, approaches and templates that are accessed by and maximise the professionalism and impact of Financial Mentors.

In implementing these tasks, the Financial Mentor Advisor will work cooperatively with other staff.

Location, Hours and Term

Location	Any location, with the ability to meet and/or spend some days per month in person at the main office in Wellington. Travel will be required.
Hours	40 hours per week
Term	Permanent

Relationships

Internal relationships	Chief Executive and other FinCap staff Any committees or teams that impact on Financial Mentors as a profession
External relationships	Financial Mentors Services where Financial Mentors are employed Organisations presenting at meetings of Financial Mentors Ministry of Social Development national office staff New Zealand Bankers' Association
Direct reports	- N/A

Key Results Areas

Key Result Area	Accountabilities	Performance Indicators
20 Communities of Practice	<ul style="list-style-type: none"> ▪ Evaluation. ▪ Attendance numbers. ▪ Tangible outcomes. ▪ Reporting as required. ▪ Led by Financial Mentors. 	The number of Communities of Practice and attendance. Evaluation of the regional groupings.
Te Papa Hou knowledge hub	<ul style="list-style-type: none"> ▪ Lead the further development of the hub for access by financial mentors. ▪ Ensure resources continue to be uploaded and updated. ▪ Support Financial Mentors access and interaction with the hub. ▪ Reporting as required. 	Access numbers. Feedback on usefulness. Cases, approaches and templates available.
Standards and quality control	<ul style="list-style-type: none"> ▪ In the postholder's area of responsibility, ensure that FinCap complies with all statutory and contractual requirements at all times. 	The Chief Executive is kept fully informed of all necessary issues and events that may have a potential impact on the organisation.

Person Specification

Experience

- Experience working as a Financial Mentor or in a similar role and/or related professional field.

Qualifications

- A relevant tertiary qualification and/or equivalent experience.

Knowledge / Skills

- Good organisation.
- Strong written and verbal communication skills.
- Interpersonal skills, facilitation and strengths-based approaches.

- Highly competent MS Office suite.
- Experience working with Māori and Pacific communities.
- Understanding of not-for-profit sector.
- Social justice understanding.
- Event and/or meetings logistics and management.
- Understanding of, and commitment to, the principles of Te Tiriti o Waitangi – The Treaty of Waitangi.

Attributes

- Strong client and service delivery focus.
- Open, collaborative communication style.
- Ability to think clearly under pressure.
- Problem solving abilities.
- Disciplined time management skills.
- A self-starter, able to take the initiative and work with minimal supervision.
- Influential.
- Ability to handle personal, confidential information.
- Reliable, flexible and willingness to take on a wide range of tasks.
- Commitment to FinCap's strategy, vision, mission and values.

Personal

- No criminal convictions, unless of a minor nature that will have no effect on FinCap. A Police Vetting/Ministry of Justice Check will be required before confirmation in the role.
- Will not engage in any other activity or interest that would conflict with the interests of FinCap.
- Statements or public representation of the organisation will be made only with the express permission of the CE.