

Position Description

Community Finance Capability Manager

Mission

Motivated by our Christian heritage, and in partnership with others, we work across the generations for positive change, strong families and healthy communities.

POSITION PURPOSE AND PRIMARY OBJECTIVES

Purpose

As a motivated and passionate leader, you will be instrumental in driving our financial inclusion services which are a key enabler to reducing poverty and enabling prosperity. Financial well-being is at the heart of our flagship services.

Primary Objectives

- To lead financial inclusion best practice which is underpinned by the Safer Credit and Financial Inclusion strategy.
- This will be across our Building Financial Capability Teams (BFC) and Community Finance Loan Workers (CF) and to lift the profile of Family Works in leading this space at a local, regional and national level.
- To lead our BFC teams, Financial Mentors and CF teams to build a high-performance culture, which enables quality and seamless service delivery in both the financial mentoring and micro-finance arenas.
- The Community Finance Capability Manager will also work as part of an effective Family Works Leadership Team providing both strategic and operational excellence and support within the suite of financial inclusion services.
- Ensuring all financial inclusion services alleviate and reduce financial hardship in our community by ensuring that people have access to good financial services and products. This includes pro-actively increasing financial prosperity for our clients and their whanau.

- Planning, managing and coordinating all BFC and CF activities, including resources, finances and administration, and reporting within established policy guidelines.
- Establish and maintain positive relationships with our key stakeholders, partners and providers i.e., Good Shepherd NZ, BNZ, other Community Finance Providers, FinCap, other BFC providers and other Budget Services Providers.

Accountability	Expected Outcomes / Key Performance Indicators
Leadership and Team Performance	<ul style="list-style-type: none"> • Provide BFC and CF staff with clear leadership and direction which supports best practice excellence in both arenas and in line with PSO's strategic direction and financial inclusion key performance indicators. • Provide coaching to staff and motivate team to achieve agreed objectives and to enable staff to reach their full potential. • Provide leadership and direction to relevant social service providers and financially inclusive services e.g. FinCap, other BFC Providers, Good Shepherd, BNZ, and other micro-finance services.
Staff Management	<ul style="list-style-type: none"> • Manage and coordinate the activities of the BFC Financial Mentors and CF Loan Workers. • Facilitate effective working relationships and communications between Financial Mentors, Loan Workers and other Family Works and PSO staff. • Develop and implement systems including risk management mitigations. • Maintain up to date knowledge of Human Resource policies and practice relevant to the financial inclusion services. • Negotiate with staff in conjunction with the Team Leader a performance plan, including a training and development plan. • Undertake and complete Performance Appraisals for all direct reports.

<p>Provide Operational Oversight of the Community Finance Programmes.</p>	<ul style="list-style-type: none"> • Management of No Interest Loan Scheme (NILS) Loan Book, including accountability for accurate bookkeeping and oversight of all administrative tasks relating to the loan portfolio. • Development and maintenance of PSO NILS Policies & Procedures manual. • Ensure effective arrears management for all active NILS loans. • Oversight of Loan Assessment Committee (LAC) and loan application standards and lending purposes. • Management of internal and external reporting processes. • Preparation for and participation in all audits as required by partners.
<p>Provide Operational Oversight of the Building Financial Capability Service</p>	<ul style="list-style-type: none"> • Identify and build on Financial Mentoring ‘best practice’ in collaboration with BFC team. This includes aligning with the Safer Credit and Financial Inclusion strategy. • Development and implementation of a framework to engage clients on their financial wellbeing journey. • Oversight of data entered on Client Voices and PAUA databases to ensure accuracy in line with reporting guidelines. • Strengthen existing debt solutions services to address complex debt. • Staff are empowered to engage clients to regain control of their financial wellbeing.
<p>Facilitate and Enhance Development of Financial Inclusion Services</p>	<ul style="list-style-type: none"> • Recognising and breaking down the existing barriers to people accessing our BFC services. • Working to ensure that our services are easily accessible, appropriate, and can respond to clients’ cultural context, language, diversity, and personal situation, including any impairments or disabilities. • Development of peer led ‘money mates’ groups to promote money conversations.

	<ul style="list-style-type: none"> • Consultation with the local communities to gauge needs and gaps to bring about financial inclusion for hard-to-reach communities. • Provide direction and marketing strategies for the Community Finance Programme to develop profiles and development of new sites of “Good Loans” programme. • Lead networking in the local area where a new site is embedded.
<p>Facilitate Staff Development within Financial Inclusion Services</p>	<ul style="list-style-type: none"> • Attend recruitment interviews for Community Finance staff to provide advice in relation to the specific skills / experience required. • Support CFWs and BFCs to optimise the results achieved under the Community Finance Programmes and Building Financial Capability Services. • Liase with Team Leaders and Director of Family Works in relation to staff performance where needed. • Provide line management to Community Finance & BFC team members as required. • Oversight of professional development for all team members.
<p>Relationship Management</p>	<ul style="list-style-type: none"> • Develop and implement Financial Inclusion Business Plans that align with best practice Building Financial Capability standards and within agreed Micro-Finance standards. • Establish and maintain effective working relationships with key external partners and with internal stakeholders. • Establish positive working relationships with all key providers and stakeholders to enhance Family Works presence in the Financial Inclusion arena. • Advise Director of Family Works of any changes, to policy or procedures,

	<p>including challenges to service delivery required for successful operation of the programmes.</p> <ul style="list-style-type: none"> • Advocacy at FinCap level with all relevant legislation to support ongoing awareness of gaps for people on a limited income in financial inclusion/wellbeing.
Quality Assurance	<ul style="list-style-type: none"> • Effective measurement tools to evaluate client outcomes are actively monitored, measured and improved. • Demonstrated evaluation of ongoing client engagement and improvement. • Agreed expected service standards are demonstrable and consistent.
Financial	<ul style="list-style-type: none"> • Prepare the BFC and CF budget in accordance with PSO Finance plans. • Oversight and management of Good Shepherd Budget and Building Financial Capability Budget. • Ensure all financial inclusion services are delivered within the agreed and approved budget. • All PSO resources and assets are effectively and efficiently managed. • All funding accountability reports, invoicing and other reports are accurate and within agreed time frames.
Knowledge	<ul style="list-style-type: none"> • Maintain up-to-date knowledge of all areas of best practice in Building Financial Capability and the Micro-finance arenas at both a strategic and operational level. • Keeping abreast of all regional and national opportunities, relevant legislation, including changes and relevant policy and practice. • Keep abreast of political, economic, social imperatives and trends relative to both the BFC and Micro-finance arena, including debt solutions services.

Expectations of all PSO Employees	
Communications / Interpersonal relationships	<ul style="list-style-type: none"> • Positive and collegial relationships are developed and maintained. • Verbal and written communication is at a high standard, relevant and appropriate to the audience.
Performance development and learning	<ul style="list-style-type: none"> • Active engagement with personal development review process. • Personal and professional development goals and objectives are established. • Be responsible for own ongoing education and skills required in designated role.
Continuous improvement	<ul style="list-style-type: none"> • Make recommendations for improvement to services, work practices and / or workflow.
Health and Safety <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"> • All employees are expected to identify, report and where appropriate resolve issues that may cause harm to themselves or others in the organisation. • You are expected to work safely and to actively participate in health and safety programmes in your work area. • All accidents or potential hazards must be reported to your direct line manager.
Te Tiriti O Waitangi / The Treaty of Waitangi <i>PSO is committed to its obligations under Te Tiriti o Waitangi / the Treaty of Waitangi.</i>	<ul style="list-style-type: none"> • 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.
Relationships	
Reports to: Director	Direct Reports: Community Finance Team Leader Other direct reports as required
Internal Relationships: Director Team Leader Community Finance	External Relationships: Good Shepherd NZ including Development Manager

Community Finance Loans Workers Financial Mentors Family Works Leadership Team Family Works Staff across all sites and regions Other PSO staff as appropriate	Clients and their families BNZ staff including Head of Community Finance Community Agencies Suppliers Community Loans Providers Other BFC Providers Budget Advisory Services FinCap
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Person Specifications

Work Qualifications / Skills

- Full Drivers Licence

Experience/ Knowledge

- Experience in welfare/community services environment.
- Experience in microfinance, lending and/or social development preferred.
- Must have management experience of at least 5 years.
- Aptitude for financial products and services that promote financial inclusion and safer credit.
- Demonstrated knowledge and understanding of the needs of people on a limited income.
- An ability to coach and promote performance with a team to achieve optimal results for the service and its clientele.
- Experience in project management is desirable.
- Ability to market the scheme effectively in the local community in a way that generates quality enquiries.
- Sound computer literacy.

Personal Qualities

- Ability to train and support staff.
- Sound problem solving, decision making, planning and evaluation skills.
- Excellent interpersonal and communication skills.
- Exceptional Relationship Management Skills
- Exercises sound judgement and political sensitivity
- Flexible, adaptable, pragmatic and responsive
- Client, Whanau and Community Centred
- Ability to work in a target focused environment and work well under pressure.
- Ability to work autonomously and to adapt to the environment of the various centres involved in the scheme.
- Time and desk management skills to prioritize multiple tasks and keep track of work in progress and meet deadlines.
- Performance Management
- Welcomes and values diversity and contributes to an inclusive working environment where differences are acknowledged and respected.

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 hold 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

In fulfilling our Mission, we will endeavour to act with Faith, Compassion, Respect, Integrity, Courage, and Independence.

