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| <b>POSITION TITLE:</b> | <b>Finance and Consumer Service Officer</b>                                                                                                                                                                                                                                                                                                     |
| <b>FTE:</b>            | <b>1.0 (38 Hours per week)</b>                                                                                                                                                                                                                                                                                                                  |
| <b>CLASSIFICATION:</b> | <b>Band 4.1</b>                                                                                                                                                                                                                                                                                                                                 |
| <b>DIVISION:</b>       | <b>NDIS Services</b>                                                                                                                                                                                                                                                                                                                            |
| <b>PROGRAM:</b>        | <b>Plan Management</b>                                                                                                                                                                                                                                                                                                                          |
| <b>LOCATION:</b>       | <p>Hybrid, in accordance with the Windermere Ways of Working with your primary location being Western Melbourne, including outreach to support consumers (if applicable to your position).</p> <p>Windermere reserves the right to request you to work at any Windermere location, including our main offices at Narre Warren and Pakenham.</p> |
| <b>TENURE:</b>         | <b>Ongoing</b>                                                                                                                                                                                                                                                                                                                                  |
| <b>DATE:</b>           | <b>February 2024</b>                                                                                                                                                                                                                                                                                                                            |

## 1. ABOUT WINDERMERE

Windermere is an independent, not for profit community service organisation working across Victoria including key regional locations, to help those who need it most. Established in 1992, our aim remains constant; to build stronger, connected and supported communities.

Working together with our community, we deliver many services through critical partnerships with government to meet our purpose.

We aim to get in early to help children, families and individuals find the best solutions for their varied and complex issues.

Our support comes in many forms with a focus on intervention, prevention, and education to make a difference in the areas of:

1. **Family Wellbeing** by promoting positive behavioural changes, providing parenting supports and responding to violence and/or neglect to achieve safety and stability
2. **Disability Support** by providing assistance to identify the right supports and goals that matter most to enable people of all abilities to actively participate in their communities
3. **Development & Early Childhood Education** by delivering accredited quality early childhood and care services and specialist early intervention services to help children reach their full potential
4. **Victims Assistance** by providing timely and ongoing practical and emotional support for victims of trauma, assault and/or violent crime
5. **Community Strengthening** by mobilising support services to respond quickly to emergencies, disasters and emergent needs.

We believe that everyone is someone in our community and this is reflected in our approach with those we work with every day.

## 2. OUR PURPOSE, VISION, AND VALUES

**Our Purpose:**

We get in early to make a difference in the lives of individuals, families and communities.

**Our Vision:**

A stronger, connected and supported community.

**Our Promise:**

Our many services working together with you for a better life.

**3. KEY RESULT AREAS, RESPONSIBILITIES AND PERFORMANCE MEASURES**

| Key Result Areas                                                                                                                     | Responsibilities                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Performance Measures                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Financial &amp; Plan Management</b>                                                                                               | <p>Coordinate receipting, Invoicing, and reconciliation of consumer payments in collaboration with Finance team and the NDIA.</p> <p>Record relevant financial transactions in the different system/ databases and maintain records.</p> <p>Reporting any irregularities in data to management as appropriate.</p> <p>Producing reports and other financial documents as relevant.</p>                                                                                                                                                                                                                                                                                                   | <ul style="list-style-type: none"> <li>As per Work Plan</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Consumer Service</b>                                                                                                              | <p>Promptly attend to all incoming calls, correspondence, email enquiries, answering directly relating to your area of services or directing to relevant staff as appropriate.</p> <p>Perform general administration duties for the consumer as required.</p>                                                                                                                                                                                                                                                                                                                                                                                                                            | <ul style="list-style-type: none"> <li>As per Work plan</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Organisational expectations and directives in relation to policies and procedures and the organisation’s purpose, vision and values. | <ul style="list-style-type: none"> <li>Familiarise yourself with and adhere to Windermere’s Policies and Procedures, including the Code of Conduct, Human Resources policies and guidelines and Occupational Health and Safety obligations.</li> <li>Demonstrate dedication and commitment to work in accordance with Windermere’s values and behaviours.</li> <li>Attend prearranged dates scheduled for supervision and organisation wide training, including organisation forums and on line induction and be actively involved in the 6-week induction review, 3 and 6-month probationary reviews and a recurring annual performance review with the relevant supervisor.</li> </ul> | <ul style="list-style-type: none"> <li>Ensure policies, procedures and codes are complied with at all times.</li> <li>Ensure all interactions are undertaken in accordance with the behaviours set, as outlined in the Code of Conduct.</li> <li>100% attendance at performance reviews.</li> <li>Completion of induction and orientation within set timeframes.</li> <li>Positively embrace and adopt change as it occurs.</li> <li>Ensure arrangements are made so that 100% of courses are attended or completed.</li> </ul> |

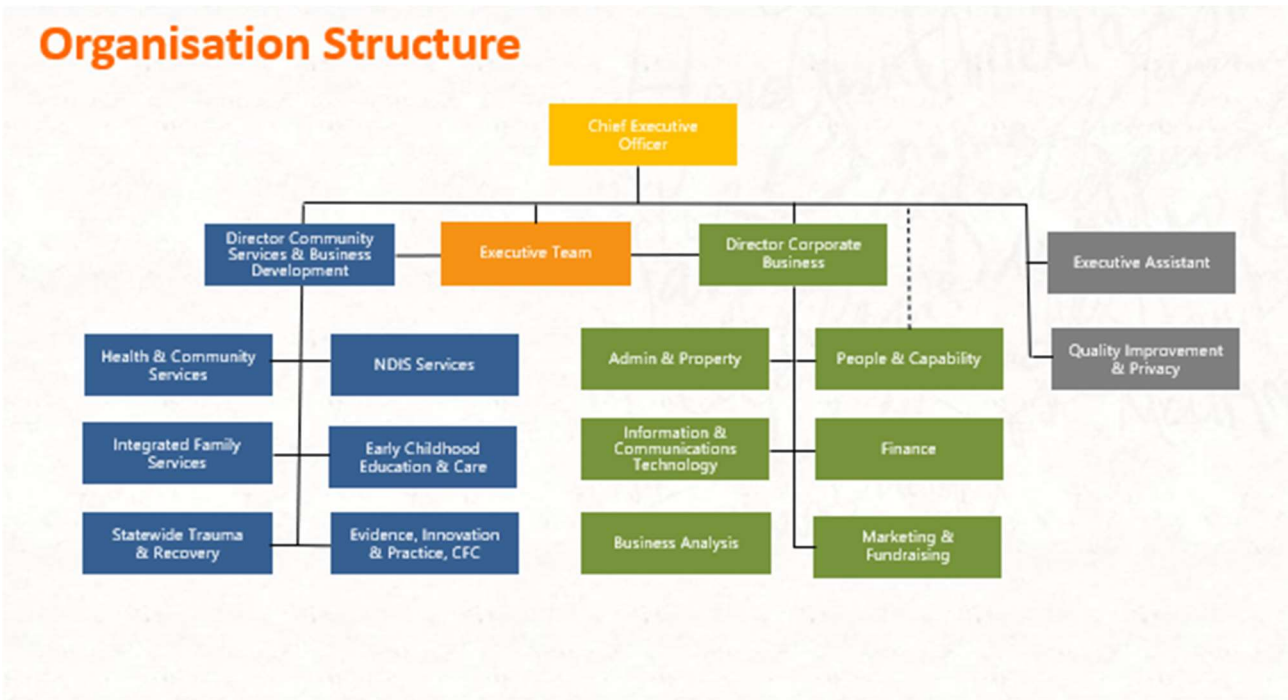
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|  | <ul style="list-style-type: none"> <li>• Contribute to or participate in Continuous Quality Improvement (CQI) activities of the organisation, and will implement CQI strategies into their work practices.</li> <li>• Meet the challenges of change as it occurs within the service and organisation.</li> <li>• Attend or complete foundation and position specific training courses set by the organisation and attend or complete discretionary training as approved by the supervisor.</li> <li>• Actively assess, manage and where possible mitigate workplace risk including (OH+S), consumer related risk, reputation risk and personal risk.</li> <li>•</li> </ul> | <ul style="list-style-type: none"> <li>• Report risk to the appropriate Windermere personnel and utilise current risk management tools and procedures available.</li> <li>• Protect the rights, safety and wellbeing of children and provide a child safe environment.</li> </ul> |
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The employee will be expected to perform other duties outside those set in the position description as directed from time to time which are within the employee’s skill, qualification, experience and competence level to meet the organisation’s operational needs.

The Position Description may be amended from time to time at the organisation’s discretion. Where there is inconsistency between KPIs in this Position Description and those within the Organisation Objectives, the Organisation Objectives will stand.

Windermere is committed to equity & equality for consumers and employees, this by building diverse and inclusive services and work environments, where all peoples from Aboriginal & Torres Strait Islander, CALD, LGBTIQ+ Communities and those living with disability will know and feel accepted, affirmed, safe and celebrated. Windermere is delivering this through the continued development and implementation of our Welcoming and Inclusion Strategy 2021-2024 as we seek to provide a diverse workforce at all levels.

**4. ORGANISATIONAL RELATIONSHIPS**



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**LINE MANAGER:** Team Leader – Plan Management

**SUPERVISES:** NIL

**INTERNAL RELATIONSHIPS:** EIDS team, Finance team, Property and Admin team

**EXTERNAL RELATIONSHIPS:** Consumers, Government, Stakeholders

**5. KEY SELECTION CRITERIA**

- Strong computer skills and knowledge of Microsoft products especially excel.
- Proven knowledge of financial processing systems (Brevity Plan management system an advantage)
- Exceptional written and verbal communication and interpersonal skills
- Sound judgement and decision-making ability, ability to work autonomously and flexible in a changing environment
- Willingness to promote and support practices that are inclusive, culturally responsive, safe and accessible.
- Current Victorian Drivers' Licence.
- Willingness to undertake relevant pre-employment screening and checks.
- Right to Work in Australia e.g. Australian Citizen, Permanent Resident or Visa holder with full working rights

**6. APPLICATION DETAILS**

To maximise your opportunity for employment, it is recommended that you provide the following information:

- Covering application letter briefly addressing the Key Selection Criteria
- Current Resume

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I have read this document and agree to undertake the duties and responsibilities listed above.

I acknowledge that:

- The PD is an indication of the duties and responsibilities that I may be required to undertake. Additional or other duties and responsibilities may be allocated to me. Where additional training and support is required to fulfil extra or other duties of a similar level of responsibility, it will be provided within the guidelines of Windermere's Training and Development policy.
- The PD will be reviewed regularly in consultation with me.
- The Key Performance Indicators (KPIs), where included in this document, are indicative. KPIs will be set by the immediate supervisor in discussion with me, for each year (or another set period) and my performance reviewed against those KPIs.

**Occupant:**

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_