

This job description describes the tasks that will be required of the job holder but does not form a part of the job holder's Employment Agreement. To ensure that the role continues to best serve CAP's mission the Job Description may be updated. Therefore, flexibility from the job holder is required.

Location of the Role

CAP Head Office, Penrose, Auckland

Purpose of the Role

As part of the Client Support Team, the purpose of this role is to provide long term wrap around support and financial guidance to clients who are on their journey out of debt. With an emphasis on relationship and care, this role enables clients to grow their financial capability and receive help when navigating life's changes. You will play a significant part in restoring hope to families who may not have previously seen a way out of their financial struggles.

Key Relationships

Department: Client Services

Direct Manager: Client Support Team Leader

Direct Reports: None

Key Internal Relationships: **Client Services Team**

Work collaboratively within the department to provide excellent support for clients and empowering them to make informed decisions on their journey out of debt.

Key External Relationships: Clients
Creditors

Summary of Role Accountabilities

1. Support clients to financially navigate life's changes and ensure they receive accurate solutions for clearing their debt.
2. Be a team player when managing workload and help maintain excellent service standards.
3. Maintain a high level of professionalism and compassion
4. Be an active participant in organisation-wide activities

Role Accountabilities on a day-to-day level

1. Support clients to financially navigate life's changes and ensure they receive accurate solutions for clearing their debt.

- Ensure budgets are up to date and accurate by conducting reviews of the client's income, expenses, and debts.
- Comfortably manage inbound and outbound calls in a predominantly phone-based service.
- Grow in your understanding of debt solutions options such as insolvency, debt settlements, microfinance, and advocacy.
- Empower clients to engage with Work and Income and Inland Revenue to ensure they receive full and correct entitlements.

2. Be a team player when managing workload and help maintain excellent service standards.

- Work as a team to stay on top of daily tasks such as emails, phones, and case reviews.
- Keep clear records of all client interactions using CAP's CRM system.
- Discuss complex cases as a team and raise any concerns with your Team Leader.
- Engage creditors to establish payment arrangements and confirm debt balances.
- Collaborate with other Client Services Teams to enable the smooth transition of new clients into the Client Support Team.

3. Maintain a high level of professionalism and compassion

- Respond to all communications with a compassionate and non-judgemental attitude, seeking to understand and listen to clients as they reach out.
- Take opportunities to pray with clients as they share wins and challenges.
- Act professionally when engaging external stakeholders like creditors or other agencies.
- Take initiative to consider what improvements could be made to raise the level of professionalism and quality of service within Client Support or the wider department.

4. Be an active participant in organisation-wide activities

- Actively participate in praying with colleagues for the work of CAP.
- Actively participate in various organisation-wide events and activities.
- Help with 3-4 CAP Church Talks per year around Aotearoa by supporting or doing the talk.
- Participate in Te Ao Māori and Pasifika learning and development opportunities.

Requirements of the Role

Personal attributes & values

- A strong personal alignment with the foundational Christian philosophy, organisational identity, and values of CAP.
- A passion to see individuals and families across Aotearoa set free from debt and poverty.
- Work comfortably in a Not-for-Profit organisation that seeks to honour Te Tiriti o Waitangi in the way work is done.
- Has good attention to detail.
- Takes pride in a strong work ethic.
- Enjoys problem solving and finding solutions.

Skills, knowledge, expertise & experience

- Knowledge in personal finances and budgeting.
- Customer service experience, ideally in the relevant fields of either finance or social services.
- A willingness to learn and invest in understanding Māori, Pasifika, and other ethnicities.
- Excellent relationship building and people skills, with a proven track record of working collaboratively in a team.
- Clear communicator with excellent written and phone-based skills.
- High emotional intelligence, with an ability to navigate difficult client and colleague conversations with respect and compassion.
- Competent computer skills, able to work fast and accurately.

Educations and qualifications

- At least NCEA Level 2 Maths and English indicating good literacy and numeracy.
- Relevant degree qualification (preferred).
- Full Training will be provided.

Job description prepared by: Kath Tuiloma

Last Updated: September 2022