

# Advocacy Manager

(FTE 1.0)

JOB DESCRIPTION

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. This Job Description is likely to change from time to time, to ensure that the role continues to best serve CAP's values, vision and impact model. Therefore, flexibility on the part of the job holder is required.

## Location of the Role

CAP Support office, Auckland

## Hours of work

8.45am - 5pm

## Purpose of the Role

To provide leadership and direction to the Advocacy team, contributing to a team culture of accountability, collaboration and ongoing learning, strengthening positive outcomes for clients

To provide management of all operations within the Advocacy Team, to ensure that the team is responding to advocacy recommendations with excellence and is maximising positive outcomes from clients who experience irresponsible lending

## Key Relationships

Department:	Services Department – Client Services
Reports to:	Head of Client Services
Direct Reports:	Advocacy Advisers (x2)
Key Internal Relationships:	Solution Support Manager and wider team Financial Mentor Manager and wider team Services Trainer Service Development Team People & Culture Team
Key External Relationships:	External Financial Mentors/FM Organisations Commerce Commission/FMA Dispute Resolution Services Community Law/Te Ara Ture Utilities Disputes Resolution Citizens Advice Bureau MBIE – Consumer Protection Communities of Practice

## Summary of Role Accountabilities

1. Monitor and facilitate the service delivery outputs of the Advocacy Team
2. Identify insights and trends pertaining to the Advocacy team and its functions
3. Ensure healthy collaboration across the Advocacy Team and relevant stakeholders
4. Lead the Advocacy team to deliver CAP's VVI, while growing in Client Service Competencies
5. Develop and maintain key strategic relationships to enable better client outcomes
6. Champion and actively participate in organisation-wide rhythms and initiatives

## Role Accountabilities on a day-to-day level

### **1. Monitor and facilitate the service delivery outputs of the Advocacy Team**

- Ensure service delivery is aligned with key CAP key CAP's Impact Model, Transformational Pillars, Quality of Debt Solutions, Strategic priorities, as well as relevant sector standards and practices
- Monitor workflow effectiveness
- Monitor and facilitate the technical outputs and accuracy of the functions of the Advocacy Team as they outwork FM recommendations for client advocacy, including evidence gathering, case investigation, client communication, dispute submission and management, logging and communicating dispute outcomes. Monitor client outcomes for the Advocacy Team, in line with CAP's evaluation framework
- Monitor the use of CAP's systems, including tech systems
- Monitor service delivery standards and timeliness of delivery for the Advocacy Team
- For all areas of monitoring, raise opportunities and issues with the Head of Client Services, and provide recommendations for change where possible
- Empower team members to deliver on the quality of advice that is expected as part of delivering Debt Help, while ensuring that casework is evaluated and areas for improvement are actioned
- Support the team in resolving complex issues, escalating the complex situations to the Head of Client Services where needed. Lead conversations where appropriate, being prepared to lead the advocacy efforts for challenging or complex situations.
- Manage the various channels of communication, ensuring that communication is clear, accurate, appropriate and aligned with CAP's values and practices
- Maintain thorough and up-to-date knowledge of relevant consumer finance legislation to ensure the team is outworking casework in accordance with legislation. This includes: Credit Contracts and Consumer Finance Act 2003, Credit Contracts and Consumer Finance Regulations 2004, Fair Trading Act 1986, Consumer Guarantees Act 1993, Privacy Act 2020, the current Responsible Lending Code
- In collaboration with the Services Director, ensure all client and creditor complaints are reported and investigated, with required improvements effectively actioned.
- Ensure all client, creditor and advocacy processes are in line with CAP's Privacy Policy and any errors/concerns are reported. In collaboration with the Privacy Officer ensure all privacy errors/concerns are investigated, with required improvements effectively actioned
- Provide coverage for the team during times of leave and vacancies
- Complete administrative tasks as required

*Performance Indicators or Measurable Outputs:*

- KPIs relating to service delivery and effectiveness
- KPIs relating to client outcomes and experience
- All complaints investigated and recommendations actioned

**2. Identify insights and trends pertaining to the Advocacy team and its functions**

- Manage all required reporting-including dashboards, KPIs, progress indicators, budgets and all relevant commentary ensuring that reports are appropriate for the audience and support the identification and execution of appropriate actions
- Ensure accurate and timely reporting of Advocacy Team inputs
- Through different channels of reporting and evaluation, identify trends pertaining to the Advocacy Team, including trends in team resourcing, service delivery, client outcomes and client experience
- Contribute recommendations to the Head of Client Services on the above
- Outwork the Advocacy Team operational requirements of the Services Department and Client Services annual plans
- Foster a culture of accountability across the Advocacy Team by sharing and discussing results, wins, mistakes and learnings

*Performance Indicators or Measurable Outputs:*

- Evaluation practices are prioritised and embedded in the team
- Reporting allows for effective management of opportunities, concerns and changes in service delivery outputs/client experience
- Number of recommendations surfaced and effectively implemented
- Deliverables as determined by Annual Plans

**3. Ensure healthy collaboration across the Advocacy Team and relevant stakeholders**

- Build and maintain strong relationships with the Client Services Leadership Team, to enable effective management of cross team functions and workflows
- Build and maintain strong relationships with the FM team, to enable effective collaboration and management between Financial Mentors and Advocacy Advisers
- Build and maintain strong relationships with the Service Development team, to contribute subject matter expertise to improvement and innovation initiatives
- Contribute operational subject matter expertise to the consideration and implementation of recommendations resulting from improvement and innovation projects
- Ensure Advocacy Advisers have strong relationships with clients where appropriate, including timely and effective communication, and conduct reviews on cases to ensure clients are receiving the right advice and are on track toward positive outcomes.
- Build and maintain strong relationships with the Services Trainer so that they can deliver effective training in support of the FM team and its purpose
- If currently a financial supervisor, work closely with Financial Mentor Supervisor to sign of Financial Mentors in Training. If still working towards becoming a Financial Mentor, shadow and provide support to the Financial Mentor Supervisor

*Performance Indicators or Measurable Outputs could include:*

- Health check indicators for internal relationships, including project evaluation, stakeholder surveys
- Contribution to cross-team projects and their deliverables

#### **4. Lead the Advocacy team to deliver CAP's VVI, while growing in Client Service Competencies**

- Manage team culture and contribution so that there is a culture of improvement, innovation, and collaboration, strengthening CAP's overall Vision, values, impact model, EVP, and services direction.
- Champion the Health, Safety and Wellbeing of the team, ensuring identification and reporting of any HSE risks. Collaborate closely with the Head of Health, Safety and Environment, to develop, maintain and embed policies, practices and training within the team.
- Ensure the Advocacy Team is delivering advocacy support according to relevant FinCap requirements and additional CAP frameworks, such as the Quality of Debt Solutions
- Role model and lead direct reports through CAP's performance program, conducting regular performance reviews, facilitating meaningful check-in and development conversations, and adjusting job descriptions as needed
- In conjunction with People & Culture effectively manage all people related responsibilities, including recruitment, addressing performance or conduct concerns, ensuring policy adherence, managing leave and flexible work arrangements
- Role model and cultivate wisdom and discernment within the Advocacy team, equipping them to navigate ambiguity with confidence, and demonstrate personal and professional indifference in client situation
- Foster a culture of performance, ensuring service excellence and accountability
- Motivate, support, and empower direct reports to achieve team objectives by setting clear goals, reviewing results, and holding regular meetings to facilitate progress
- Actively support the team by engaging in casework to maintain team objectives and case momentum, where necessary, during busy periods and during team leave
- Champion change management processes within the advocacy team, fostering a culture that embraces and effectively embeds change
- Equip the team with the tools, training and support needed to develop in the Client Service competencies
- Foster a culture of celebration and recognition, acknowledging staff contribution and utilising organization-wide tools, such as Whakatinana
- Ensure appropriate oversight of relevant technical systems of CAP's services delivery. Ensure the team is trained and competent utilising CAP's technical systems, including; Tūmanako and other systems
- Commit to ongoing personal development, including participating in any future changes regarding the professionalisation of the sector
- Provide oversight into staff training and a standard of excellence in casework, working alongside the Client Services Managers and Services Trainer
- Provide support signing off Financial mentors in Training

*Performance Indicators or Measurable Outputs could include:*

- The Advocacy Team is clear and agreed on their purpose of delivering Debt Help
- Staffing needs of the team in relation to workload are anticipated and planned
- Team are clear on services strategic plan and key metrics to be achieved
- Team performing against Client Services Competency framework
- Engagement surveys and other forms of staff feedback and evaluation shows the health of team culture, engagement and performance and/or improvement in these areas

#### **5. Develop and maintain key strategic relationships to enable better client outcomes**

- Ensure healthy relationships with external stakeholders, such as relevant roles at Commerce Commission/FMA, Disputes Resolution Services, Community Law/Te Ara Ture, Utilities Disputes Resolution, Citizens Advice Bureau. MBIE – Consumer Protection
- Coordinate strategic relationship management with the Head of Client Services, Services Director and/or CEO, who may be holding strategic relationships at the same organisation. Ensure familiarity with strategic priorities and conversations.
- Identify ways to maximise opportunities within those relationships, for the purpose of increasing effectiveness of CAP's advocacy work, this is particularly related to ways CAP can effectively collaborate with external partners given the volume of clients we share in common
- Ensure Advocacy Team members effectively engage in external operational relationships relevant to their roles, including outworking CAP standards around communication, professionalism and partnership!
- Participate in Communities of Practice and other collaborative opportunities as aligned with CAP's strategic plan and operational priorities

#### **6. Champion and actively participate in organisation-wide rhythms and initiatives**

Pertaining to Organisational Identity & Culture:

- Participate in daily and weekly karakia
- Engage in CAP's Haerenga and outwork CAP's Haerenga Competencies

Pertaining to Donor Relations:

- Regularly invite personal contacts to contribute to CAP's 'Life Changer' regular giving program
- Participate in fundraising activities, including an annual thankyou calling evening
- Attend a minimum of one Fundraising Dinner per year (including weekends)
- Help out with 3-4 CAP Church talks per year around Aotearoa, either by supporting or doing the talk

*Performance Indicators or Measurable Outputs:*

- Consistently participates in all of the above listed activities

#### **Authorities**

- Allocation & authority to spend Advocacy annual budget
- Leave approval for direct reports within entitlements
- Allocation of work to direct reports
- All HR management of direct reports

## Requirements of the Role

### Personal attributes & values

- A strong personal alignment with the foundational Christian philosophy, organisational identity, culture, and values of CAP
- Ability to work with many different faith expressions, where-ever they are on the spectrum of conservative to charismatic
- Ability to work and lead comfortably and well in an NFP organisation that seeks to honour Te Tiriti o Waitangi in the way work is done
- Ability to work comfortably and well in an environment which demonstrates the Christian gospel with stakeholders, shares about Jesus Christ as appropriate, and prays
- Ability to balance empathy, compassion, professionalism and best practice, and to lead others to do the same
- Ability to confidently work with vulnerable people
- Ability to safely and sensitively engage with people from different cultures & backgrounds
- Ability to calmly and confidently manage complex challenges with discernment and maturity
- Ability to work under time pressure, and a willingness to work evenings and weekends when required
- Ability to foster a growth mindset and promote a culture of continuous learning
- Ability to carry out work in a variety of locations
- Ability to work well in an environment that is undergoing purposeful and significant change and to be able to champion change and transformation

### Skills, knowledge & experience

- 2+ years proven experience in a similar role (essential)
- 2+ years proven experience working in client-centred service delivery and/or with community-based social issues
- Proven experience as a certified Financial Mentor, and Supervisor (desirable)
- Familiarity with financial institutions, systems and practices in Aotearoa
- Proven ability to lead a team, to increased purpose and work delivery, and through change initiatives
- Strong coaching skills
- Excellent communication, both written and verbal, in both formal and informal contexts
- Excellent relationship building and people skills
- Ability to work collaboratively across a range of different stakeholders
- Ability to bring fresh ideas and new thinking, with a proven track record of identifying and developing opportunities for improvement and innovation
- A strong growth, developmental and learning mindset, and mode of practice
- Strong time management with a capacity for large workloads, and an attitude of completion
- Strong skills in working collaboratively to maximise service delivery effectiveness and client experience outcomes
- Proven ability to handle sensitive information with discretion and maintain strict confidentiality
- Understanding of the power of technology for innovation and a desire to leverage this for the organisation
- Competent using a wide range of technology platforms
- Experience managing budgets, allocating resources wisely

## Qualifications

- Qualification in relevant area such as Bachelor of Business (desirable)
- Certified Financial Mentor, and FM Supervisor

**Job description prepared by:** Abbey Peters

**Last Updated:** June 2025

## Statement of Acceptance

The Employee will perform the duties set out in this Job Description. These duties may be modified and updated by the Employer from time-to-time following consultation with the Employee. The Employee also agrees to perform all other reasonable duties and comply with reasonable instructions issued by the Employer.

*I confirm that I have read and understand this Job Description, and agree to abide by the duties, tasks, and accountabilities within it.*

Signature:

Date:

Name: