

# Financial Mentor Supervisor

Fixed Term/Contractor 6 months/0.6 FTE

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

## Purpose of the Role

The purpose of this role is to provide the Client Services with additional resource to get the team trained and signed off as financial mentors. The role ensure financial mentors in training are effectively embedding the knowledge and skills from the relevant FMIC training into their daily practice and growing in the relevant competencies. The Financial Mentor Supervisor will ensure newly signed off Financial Mentors are growing in their abilities to outwork best practice with clients, reflecting both FMIC expectations and wider CAP frameworks. In addition, the role will provide coaching support to the Training Supervisor and Client Services Managers with their FM or Supervision skills.

## Key Relationships

Department:	Services Department – Client Services
Reports to:	Head of Client Services
Direct Reports:	None
Key Internal Relationships:	Financial Mentor Manager Financial Mentors/Financial Mentors in training Services Trainer Services Director People & Culture Director
Key External Relationships:	FinCap Training Co-ordinator

## Summary of Role Accountabilities

1. Monitor and assess the casework of newly trained Financial Mentors at CAP
2. Coach newly trained Financial Mentors towards growing competence and confidence
3. Ensure newly trained Financial Mentors are supported through their provisional period, in line with national industry expectations
4. Champion and actively participate in organisation-wide rhythms and initiatives (if applicable, not applicable if contractor)

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

### 1. **Monitor and assess the casework of financial mentors in training**

- Implement a framework for evaluation of casework and client engagement, consistent with national industry expectations.
- Conduct regular evaluation of a sufficient number of cases to ensure a newly trained Financial Mentor's full skillset is being assessed. Identify both areas for improvement and areas for celebration, in accordance with both national industry standards and CAP's additional frameworks, such as the Quality of Debt Solutions
- Work with the FM Manager and Head of Client Services to assess any ongoing performance concerns

#### *Performance Indicators or Measurable Outputs:*

- Number and quality of assessments
- Decrease of areas for improvement over time
- Improvement of quality of advice given to clients over time
- Increasing ability to manage complex cases

### 2. **Coach newly signed off Financial Mentors towards growing competence and confidence**

- Outwork national industry expectations of coaching and supervision
- Coach Financial Mentors towards competence in technical skills such as building budgets, preparing debt repayment plans, advising clients on benefit entitlements, consumer rights, and possible pathways towards financial resilience
- Coach Financial Mentors towards competence in case management skills such as utilising a client-centred framework, using effective communication techniques with clients and negotiation with creditors, of recording case progress and adjusting goals
- Provide coaching support and advice to Financial Mentors working towards being a supervisor
- Providing coaching support and advice to Services Trainer and Client Services Managers
- Provide effective feedback and coaching regarding the casework (where the trainee is embedding knowledge, skills, and expectations well, and also where there are gaps or deficiencies)
- Encouraging newly trained financial mentors to reflect on their own practice to foster self-assessment and personal goals
- Align feedback and coaching with CAP's additional frameworks, such as the Quality of Debt Solutions

#### *Performance Indicators or Measurable Outputs:*

- Number and quality of supervision meetings
- Number and quality of feedback given
- Embedding of feedback and pulse check indicators around competence and confidence

### 3. **Ensure newly trained Financial Mentors are supported through their provisional period, in line with FinCap expectations**

- Outwork the requirements of the provisional period, in collaboration with the Head of Client Services and FM Manager
- Where appropriate collaborate with the Services Trainer to ensure ongoing training and development opportunities are maximised, coordinated and purposeful

*Performance Indicators or Measurable Outputs:*

- Number of Financial Mentors successful completing provisional periods

#### **4. Champion and actively participate in organisation-wide rhythms and initiatives (if applicable)**

Pertaining to Organisational Identity & Culture:

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

*Performance Indicators or Measurable Outputs:*

- Consistently participates in all of the above listed activities

### **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 work under time pressure, and a willingness to work evenings and weekends when required
- Ability to work well in an environment that is undergoing purposeful and significant change and able to champion change and transformation

#### **Skills, knowledge & experience**

- 3+ years in a similar role (essential)
- 2+ years experience working in a client-centred service delivery and non-profit
- Proven Experience as a certified Financial mentor and Supervisor (essential)  
Demonstrable and strong experience of all FMIC competencies within a wide range of experience as a Financial Mentor
- Demonstrable experience with a client-centred approach
- Excellent attention to detail
- Well-developed coaching and mentoring skills
- Excellent relationship building and people skills
- Strong experience providing guidance, coaching and effective and constructive feedback
- Strong experience influencing stakeholders to improved ways of working
- Evidence of working collaboratively
- Strong communication, both written and verbal, in both formal and informal contexts
- Competent using a range of technology platforms
- Able to problem solve and to operate with a solutions-focussed approach
- Proven ability to handle sensitive information with discretion and maintain strict confidentiality

## Qualifications

- FinCap Senior Financial Mentor
- FinCap FM Supervisor
- Other supervision qualification (desirable)
- Other learning and development/coaching qualification (desirable)

**Job description prepared by:** Abbey Peters

**Last Updated:** May 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: