

Client Services Manager
 Position Description
 Effective as of Wednesday, 30 August 2017



Position Title:	Client Services Manager (CSM)
Reports to:	Chief Executive Officer
Authorised by and date:	CEO, 24 August 2017
Classification level:	Managerial (not governed by any Awards)
Roles reporting to this one:	<p>7 direct reports:</p> <ul style="list-style-type: none"> • Case Work Supervisor (1 FTE) - 5 caseworkers as direct reports • Case Manager (.8 FTE) – Outer Sydney – 0 direct reports • Case Manager (.8 FTE) – Northern NSW – 0 direct reports • Caseworker (.6 FTE) – South Australia – 0 direct reports • Community Support Services Supervisor (1 FTE) – 9 Community Support Workers as direct reports • AOD Senior Caseworker (1 FTE) – 0 direct reports • Programs Coordinator (1 FTE) – 0 direct reports • Financial Counsellor (.8 FTE) – 0 direct reports
Appointment Status:	Permanent / 76hrs per fortnight minimum (1 FTE)
Position Purpose:	<p>The Client Services Manager is a member of Bobby Goldsmith Foundation’s Executive Leadership team, and has <u>accountability</u> for:</p> <ol style="list-style-type: none"> 1. Managing the provision and delivery of support services and referrals for people living with HIV (PLHIV) to build capacity and achieve improved health and well-being outcomes by retaining clients in care; 2. Managing all workers and volunteers including students on placement within the Client Services business unit; and 3. Identifying and responding to program and service gaps and securing funding and revenue opportunities in conjunction with the members of the Senior Leadership team.
Key Challenges: (what makes role challenging, unique)	<ul style="list-style-type: none"> • You will be required to think like a seasoned strategist whilst at the same time being able to manage programs at a detailed level where required e.g. cost control, resource allocation, milestones etc. • You will draw upon your broad span of experience, and contacts established within the sector to ensure BGF’s reputation as a provider of world-class client service is maintained. • The uniqueness of the role is that it will provide you with a challenging and dynamic environment within which to hone your managerial skills with a high level of autonomy and accountability, at the same time working with the Board, Committees and a leadership team that will expose you to other areas of the organization that will contribute to your personal growth and to your professional career trajectory.

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Freedom to Act:

- This role provides the incumbent with autonomy to develop and implement all client services programs subject to the organisational delegations in effect at the time, within the confines of the current BGF Strategic Plan and subject to approval by the CEO.
- The incumbent will update the Board on all departmental activities and outcomes as required from time to time.
- Whilst the Client Services Manager has the freedom to communicate on behalf of the organization at various forums and events, all formal corporate communications must be authorised by and emanate from the office of the CEO under the stewardship of the Marketing and Fundraising Manager.

FUNDRAISING

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<p>Capability Requirements: (knowledge, skills and experience)</p>	<p>Essential</p> <ul style="list-style-type: none"> • Ability to think strategically, and actively participate in and influence the inputs and outputs of BGF’s 3-yearly strategic planning cycle. • Understanding of the sector BGF operates within, the dynamics and the activities required to meet all stakeholder expectations. • Demonstrated understanding of the client groups BGF supports, and the dominant communities they are connected to. • Excellent and demonstrated skills in the design, implementation and evaluation of a client programs. • A thorough understanding of program logic, including measuring outcomes and social impact. • Clear commitment to delivering the very best Client Relationship Management system at all times to ensure efficiency and effectiveness of case work, and transparency in all client engagement • Commitment to the development and maintenance of best-practice client service standard across all touch points • Experience in the development and maintenance of stakeholder relationships • Demonstrated experience in acquiring funding through the grant funding process during challenging times, given the proposed changes to Government funding at State and Federal levels. • Extensive experience and ability to manage projects with competing priorities and deadlines. Project management to include detailed budgeting, scoping, key milestones, implementation and measurement. • Ability to write submissions, reports and papers with an understanding of what constitutes effective communication across all media.
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	<ul style="list-style-type: none"> • High level financial management and analytical skills, particularly monthly, quarterly and annual reporting against budget and KPIs. • Outstanding skills in verbal and written communication and interpersonal relationships. • Demonstrated experience in maintaining and developing day-to-day operational procedures including records management, finance, report writing, correspondence, document and policy production. • High level competency in standard office computing in addition to PowerPoint and MS Project. • Capacity to work outside normal business hours as required from time to time. <p>Desirable</p> <ul style="list-style-type: none"> • Understanding of the role Marketing and Fundraising plays in the corporate mix with specific reference to social media • Understanding of the role Operations plays in the corporate mix with specific reference to policies and procedures, and research and evaluation.
<p>Key Relationships / Interactions / Contacts:</p>	<p>This role represents BGF at a range of stakeholder meetings. The relationships and contacts of this role are broad and varied, and include Board members, donors, government officials and funders, sponsors, corporate executives, suppliers, trusts and foundations, consultants and contractors.</p> <p>The incumbent will be required to represent BGF in settings from formal to informal. From time to time they may be expected to speak on behalf of the organisation, or lead a discussion. As such they should be confident and capable in public speaking engagements.</p>

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Key Responsibilities	Typical activities and outcomes (include but not limited to)
BGF Team Member	<ul style="list-style-type: none"> • As a senior Manager within the organisation there is a clear requirement for leadership both within your team and across the entire organisation. • Contributes positively by word and deed to the ongoing development a strong organisational culture that reflects the organisation's values. • Is an effective and active member of the BGF team who works to ensure their business unit delivers services and support that align with the mission, vision, values and goals of BGF. • At all times operates in a way that contributes to a workplace that is free of discrimination, harassment or bullying behaviour. • Leads a team to achieve team and BGF goals whilst complying with BGF policies and procedures. • Undertakes training and development to help in the achievement of individual, team and BGF goals. • Is responsible for taking action to prevent damage to the health and safety of self, other people and/or to property. Is responsible for taking prompt and correct action when actual damage/injury occurs. Ensures that BGF provides a duty of care to all in the team, at all times. • Maintains confidentiality of information at all times. • Ethically and respectfully builds and maintains effective working relationships, both internally and externally. • Adheres to and role-models the BGF Code of Conduct.
Client Support	<ul style="list-style-type: none"> • Ensures that the Client Services and Community Support team members are undertaking their responsibilities as set out in their respective Position Descriptions, and in so doing delivering outcomes as per BGF's KPIs with NSW Health and other funders. • Performs on-going reviews of BGF's service implementation, making recommendations to the CEO on strategic initiatives and quality improvements. • Provides skilful advice on the full range of BGF client support services available. • Keeps informed and up to date on the range of supports and services available to PLHIV, including undertaking training and development in new and emerging areas of the epidemic. • Ensures that crises/emergency situations are managed in accordance with BGF's Critical Incident Policy. • Plans, implements and evaluates new programs and initiatives on time and on budget according to the approved project plan.

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<p>Partner Relationships</p>	<ul style="list-style-type: none"> • Develops, manages and nurtures appropriate partner relationships to ensure delivery of BGF services and programs. • Ensures that the protocols for working with partners are appropriate to maintain agreed levels of support, service and advice to clients e.g. case conferences. • Participates in all relevant networking activities as a representative of BGF. • Ensures that the Client Services team is working effectively with BGF’s partners to provide an agreed levels of service, advice or support to BGF clients/programs. • Builds and maintains effective working relationships with internal and external stakeholders, including initiating and leading meetings. • Ensures all necessary documentation supporting partner relationships is attended to timeously e.g. MOU’s, agreements etc. • Ensures that all existing and potential referral pathways are clearly defined, documented and adhered to, thus ensuring clients are retained in care at all times and are not victims of service gaps/
<p>Operational Management</p>	<ul style="list-style-type: none"> • Follows all policies, processes and procedures. • Works collaboratively across the whole of the organisation to remove inter-departmental obstacles and barriers • Utilises effective communication skills to ensure information is distributed on a timely and clear basis. • Is responsible for own day to day administration e.g. travel, correspondence, appointments. Is forward thinking and forward planning in this regard. • Ensures data integrity of all client records on the database is maintained via routine audit process. • Develops, documents and maintains processes and procedures to manage own area of work so that essential work can be continued when absent. • Drives the organisation towards Quality Certification through the documentation of processes and procedures whilst suggesting improvements based on experience and best practice. • Ensures that financial assistance to clients is approved in accordance with the Financial Assistance guidelines. Ensures that the Financial Assistance guidelines remain relevant through an annual review process.

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Contractor/Partner Relationships	<ul style="list-style-type: none"> • Uses clearly articulated requirements and effective feedback when negotiating with consultants and contractors. • Uses highly developed communication and negotiation skills, effectively, establishing an agreed understanding of the issues and key deliverables. • Respectfully and ethically communicates when working with service providers/contractors to achieve agreed outcomes. • Uses highly developed project management skills for the development and implementation of new programs and initiatives.
Planning and Strategy	<ul style="list-style-type: none"> • Manages time, sets priorities, plans and organises their own work following established work practices. • In collaboration with CEO sets priorities, plans and organises their own work and aligns the strategic plan with the Client Services programs and projects as identified in the operating plans. • Reviews relevant project plans and updates regularly • Reviews services, suggesting improvements and drafts recommendations for improved efficiency/effectiveness. • Maintains and suggests improvements to existing and new policies and procedures to Compliance, Research and Operations Manager. • Makes recommendations to the CEO to improve the type and level of service, support and advice necessary to further enhance the client experience. • Leads the business planning and reporting processes for their business unit. • Develops strategies in response to identified service /access issues and makes recommendations with particular reference to optimising grant funding opportunities in conjunction with the Marketing and Fundraising Manager. • Undertaking additional projects and tasks as agreed with the CEO from time to time
Finance and Budget	<ul style="list-style-type: none"> • Ensures compliance with administrative and financial policies, procedures and delegations in relation to all areas of responsibility. • Contributes to the development of the annual BGF budget for all marketing and fundraising income and expenditure. • Undertakes monthly, quarterly and annual budget review in conjunction with the accountants and the CEO to identify and understand variances.
People Management	<ul style="list-style-type: none"> • Establishes, leads, coaches, and inspires a highly engaged and productive team of professional workers. • Participates enthusiastically and with integrity in the supervision and performance management processes. • Undertakes the induction and probation process of new team members, and volunteers as required. • Provides support and direction for team members. • Performs regular supervision and performance management with their 5 direct reports, routinely and well documented

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Person Specifications

(E) = Essential; (D) = Desirable

<p>Qualifications</p>	<ul style="list-style-type: none"> • Tertiary qualification in relevant, recognised social work, human services, community discipline (E) • Post-graduate qualification in a management discipline (D)
<p>Experience</p>	<ul style="list-style-type: none"> • Extensive managerial experience within a related environment (E) • Client management experience (E) • Minimum of 7 years in a similar middle-management role (E) • Minimum of 3 years in a senior management role (D) • Experience is managing new business initiatives through the grant acquisition process (D)
<p>Personal Attributes</p>	<ul style="list-style-type: none"> • Positively aligns with BGF's values • Strong ethical/moral compass • Strong leadership and management skills • Ability to clearly communicate complex information to a wide range of internal and external audiences using appropriate tone and manner • Lateral thinker, receptive to challenges and innovation • Change agent • Demonstrated successes in coaching and mentoring workers • Team oriented and highly collaborative, discerning when to work independently

Package and Requirements

<ul style="list-style-type: none"> • Tenured role • Highly competitive salary package, commensurate with skills/experience • Superannuation contribution of 9.5% • Salary packaging available • 6 month probationary period • Organisation-provided laptop and mobile phone • Based in Surry Hills, Sydney, NSW • Inter- and Intra-State travel will be undertaken • Valid, unrestricted NSW driver's license required
