



Australian Government

CHCFIN009 Provide financial counselling and systemic advocacy within a social justice framework

Release: 1

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Modification History

Not applicable.

Application

This unit describes the performance outcomes, skills and knowledge required to provide financial counselling services to clients who are impacted by systemic issues and to participate in systemic advocacy.

This unit applies to financial counsellors who work in agencies that meet the requirements for the Australian Securities and Investments Commission (ASIC) exemptions from holding a financial services or credit licence.

The skills in this unit must be applied in accordance with Commonwealth and State or Territory legislation, Australian standards and industry codes of practice.

No occupational licensing, certification or specific legislative requirements apply to this unit at the time of publication.

Pre-requisite Unit

Nil

Competency Field

Financial Counselling

Unit Sector

Community Services

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
<i>Elements describe the essential outcomes</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1. Articulate the role of financial counselling in responding to systemic issues within the social justice framework.	1.1. Identify the principles underpinning a social justice framework. 1.2. Identify characteristics of systemic issues discovered from financial counselling casework. 1.3. Interpret systemic issues that impact on the complex needs

- of clients.
- 1.4. Provide financial counselling services within a social justice framework.
 - 1.5. Apply agency approach to systemic advocacy according to organisational policies and procedures.
2. Gather and prepare evidence of systemic issues.
 - 2.1. Identify issues in individual case work and other sources that may be the result of systemic issues.
 - 2.2. Inform clients about systemic issues, the impact they may be having and options for recourse, including submitting complaints and provide opportunities for clients to participate in systemic advocacy.
 - 2.3. Keep records and case notes with view to using them for systemic advocacy.
 - 2.4. Request consent from client to take systemic action involving complaints on their behalf.
 - 2.5. Write case studies to contribute to systemic advocacy.
 - 2.6. Identify the target audience for the evidence of systemic change.
 - 2.7. Identify sources to stay informed about current and emerging systemic issues.
 3. Share evidence with relevant parties.
 - 3.1. Research existing systemic advocacy relevant to the financial counselling sector.
 - 3.2. Engage with financial counselling peak bodies, and other key stakeholders and regulators.
 - 3.3. Participate in roundtables, working groups and other key groups that effect change.
 - 3.4. Document outcomes according to organisational policies and procedures.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Reading skills to:	research and interpret information from a range of complex documents.
Writing skills to:	present information and evidence in required formats using language, structure and style appropriate to audience.
Oral communication skills to:	participate in a variety of spoken exchanges with others using clear and direct language to convey, request and

- confirm understanding of information.
- Numeracy skills to:
- access required information from familiar and unfamiliar financial reports
 - interpret and synthesise statistical data with related information to make predictions and validate research outcomes.
- Problem-solving skills to:
- identify and analyse discrepancies in information gathered.
- Initiative and enterprise skills to:
- collaborate with colleagues to achieve client outcomes.
- Planning and organising skills to:
- logically sequence information and analysis in required formats to address client requirements.
- Technology skills to:
- use main features and functions of technology and software programs to complete work tasks.

Unit Mapping Information

No equivalent unit.

Links

Companion Volume implementation guides are found in VETNet - -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=5e0c25cc-3d9d-4b43-80d3-bd22cc4f1e53>