



Australian Government

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

Release: 1

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Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- document one case study for use in systemic advocacy including:
 - overview of client circumstances
 - explanation of systemic issue
 - target audience for advocacy
 - written evidence for complaint
- perform the activities outlined in the performance criteria of this unit during a period of 220 hours of work in a financial counselling agency that has met the requirements for the Australian Securities and Investments Commission (ASIC) exemptions from holding a financial services or credit licence or in an appropriate simulated environment. These 220 hours may be applied collectively across all units of competency that include the requirement for workplace hours for the purposes of assessment.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- social justice framework, including:
 - understanding systemic causes of inequality
- being aware of the impact of structures of power on vulnerable people:
 - intergenerational trauma
 - decision making under scarcity
- history of the financial counselling sector:
 - social justice beginnings
 - campaigns for change
- Australian Financial Counselling Code of Ethical Practice
- trauma informed practice
- client-centred, strengths-based approaches to financial counselling and other models consistent with these approaches
- work health and safety
- scope and limitations of the financial counselling role

- practitioner and client boundaries, particularly with regard to the provision of therapeutic counselling
- models for self-care
- indicators of the presence of systemic issues, including:
 - unfair outcomes permitted by existing systems
 - patterns of poor outcomes associated with creditors, organisations, industry or government
 - poor outcomes for clients associated with new products
 - reports from industry or regulators
 - identification of structures which adversely affect positive client outcomes
- structure and role of peak industry bodies in the financial counselling sector
- stakeholders who play a role in systemic advocacy, including:
 - governments
 - regulators with a consumer protection remit
 - local MP
 - media
 - peak industry bodies
- procedures for making a complaint to regulators:
 - the complaints process
 - bodies to complain to
 - how to draft a complaint to a regulator
 - what evidence is required
 - why this is important
- aspects of informed consent, including:
 - privacy statement
 - checking for understanding
 - varying or ending agreement
 - third party authority forms
- process for writing case studies that support systemic advocacy:
 - targeting case study to appropriate recipient
 - clearly stating the problem or systemic issue
 - providing details of client situation
 - explaining the detrimental impact of the systemic issue on the financial and personal situation of client
 - course of action that may address the issue
- key sources of information and resources including:
 - National Debt Helpline (NDH) website
 - financial counselling peak body resources.

Assessment Conditions

Skills must be demonstrated in the workplace or a simulated workplace environment. Where a simulated environment is used for the purposes of assessment, simulations and scenarios must be included that provide the full range of context and situations that would occur in the workplace.

Assessment must ensure access to:

- suitable facilities, equipment and resources, including:
 - client information
 - organisational policies, procedures and resources
 - interactions with clients
 - where necessary - scenarios and case studies that involve complex financial situations and problem solving
 - interaction with other people.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

Links

Companion Volume implementation guides are found in VETNet - -

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