



Job Description

Position Title:	Trustee Worker		
Program:	Finance & Administration	Date Revised:	August 2010 July 2010
Reports To:	Program Manager – Finance	Date Approved:	
Reference:			

Position Summary

The Trustee Worker is responsible for the ongoing, flexible support of individuals living with mental illness, including those with a developmental disability, addictions and who are at risk or experiencing homelessness that lack money management skills. The Trustee Worker provides the necessary tools for individuals to manage their financial affairs at the highest degree of independence possible through individualized and group support. The Trustee Worker works as a member of a multi-disciplinary team within CMHA-HKPR's administrative services, working closely with clients' case managers and other community agencies.

Key Responsibilities

1. Provides Support to Clients

- Provides excellent customer and client service, developing trusting rapport and respectful communication with clients
- Manages clients' funds while providing the necessary skill training to enable them to develop and implement long-term plans for meeting their financial obligations
- Ensures that clients' funds are disbursed in such a way that their basic needs are met and that their expenses are paid in a timely manner
- Assesses skill level of individuals in order to assist in the development of their short and long-term financial goals
- Offers educational money management sessions/workshops to assist individuals to arrive at the highest degree of independence possible
- Develops and promotes partnerships with clients, family members and other service providers as appropriate
- Negotiates with creditors/collection agencies and advocating for their rights
- Prepares yearly income tax returns for clients
- Ensures that all client program exits are planned, where possible, to provide the client with transitional support



2. Completes Administrative Duties and Responsibilities

- Sets up, updates and maintains clients' personal finance accounts using accounting/bookkeeping software application(s) (Quicken)
- Maintains documentation and filing using both hard copy and electronic systems (Microsoft Office, CRMS) - ensuring that information regarding clients is accurate, up-to-date and secure (confidentiality & privacy)
- Demonstrates organizational and time management skills, accountability, reliability and punctuality
- Completes all or any designated program and organizational tasks and responsibilities as required
- Adheres to program budgets

3. Maintains Liaison With Various Community Agencies, Institutions, Local Groups and Professionals as Required

- CMHA case managers, housing support workers and CSWA's
- Fourcast, Brock Mission, Yes Shelter, Cameron House
- For the Trustee HP program - actively participate in the Homelessness Coordinated Response Team Committee
- Creditors, collection agencies, ODSP, Ontario Works
- External client supports (i.e., family members, Schizophrenia Clinic, ACT Team)

4. Organizational

- Actively participates in staff and team meetings
- Actively participates in CMHA-HKPR's performance management system
- Contributes to the development of the Finance and Administration Team and overall agency development through committee involvement
- Attends and participates in ongoing professional development and training
- Stays up to date on relevant legislation - eg ODSP & OW Directives, Income Tax Act

5. Health & Safety

- Follows established safety procedures and protocols to ensure health and safety of clients, staff/colleagues, volunteers and students – observe, report, correct issues that arise

6. Other duties as assigned

- Reception coverage
- Covering other trustee program(s) as needed

A: EDUCATION & TRAINING

- Completion of post secondary education in business administration, bookkeeping, small business accounting, personal finance or general business (diploma [2 yr min], degree)
- Diploma or degree in Social Services/ Human Services/ Psychology would be an asset



- Financial Counsellor designation would be an asset
- WHMIS
- ASIST
- NVCI
- First Aid/CPR

B: EXPERIENCE

- Minimum of two (2) to four (4) years administrative experience including bookkeeping
- Work within the mental health system would be an asset

C: COMPETENCIES

Clinical	Behavioural	Functional
Client Supports Commitment to Continuous Learning Crisis Intervention Documentation Mental Health, Dual Diagnosis Pharmacology Screening and Assessment Service Planning Substance Use/Addictions	Adaptability and Flexibility Collaboration Communication Diversity Ethics Professionalism Team Work (internal)	Analytical thinking-Functional Computer Skills Decision Making-Functional Document/Information management systems. Knowledge of community resources Organization and Planning

D: OTHER

Satisfactory police records search and vulnerable sector screening

E: WORKING CONDITIONS

- Works in an office setting with a combination of drop-in and appointment clients and is often subject to multitasking, prioritizing and competing demands
- Works with individuals living with serious mental illness, issues of poverty and substance use



**Canadian Mental
Health Association**
Haliburton Kawartha Pine Ridge

Name (*please print*)

Signature

Date