



Position Description

Position Title:	Trustee Worker		
Program Name:	Finance	Position Classification:	6
Reports To:	Manager of Finance		
Effective Date:	August 2017	Review Date:	

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, who are at risk or experiencing homelessness, and who 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 support. The Trustee Worker works as a member of a multi-disciplinary team within C.M.H.A. H.K.P.R. administrative services, working closely with clients' case managers and other program staff and community agencies.

Key Responsibilities

1. Client Supports

- Provide quality client service, developing trusting rapport and respectful communication
- Manage, track and ensure 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
- Assess current skill level of clients to provide the necessary skill training to enable clients to develop and implement short term and long term plans for meeting their financial well being
- Offer educational money management advice to assist individuals to arrive at the highest degree of independence possible
- Develop and promote partnerships with clients, family members and other service providers as appropriate
- Negotiate with creditors/collection agencies and advocates for client rights



- Prepare yearly income tax returns for clients
- Ensure that all client program exits are planned, where possible, to provide the client with transitional support

Administrative Duties and Responsibilities

- Set up, update and maintain clients' personal finance accounts using accounting/bookkeeping software application(s) (i.e. Quicken)
- Maintain documentation, filing using both hard copy and electronic systems (Microsoft Office, C.R.M.S.) - ensuring that information regarding clients is accurate, up-to-date and secure (confidentiality & privacy)
- Ensure accurate logging and reporting of client meetings to support organizational funding requirements
- Adhere to program budgets

2. Documentation

- Personal Finance Accounts
- Quicken
- Microsoft Office, C.R.M.S. for client accounts
- Income Tax documentation
- Personal Identification of Clients

3. Other Activities

- Liaise with Fourcast, Brock Mission, Yes Shelter, Cameron House
- Liaise with Homelessness Coordinated Response Team Committee
- Liaise with creditors, collection agencies, O.D.S.P., Ontario Works
- External client supports include family members, Schizophrenia Clinic, A.C.T. Team

4. Performance Management and Professional Development

- Participate cooperatively in the agency performance management process/system
- Stay current on relevant legislation and best practices, current research, policies and procedures
- Participate in ongoing professional development and mandatory training
- Actively engage and participate in supervisory process



5. Health and Safety – Worker Responsibilities

- Work in compliance with the Occupational Health And Safety Act, applicable regulations and all organizational health and safety requirements and procedures to ensure the health and safety of clients, staff/colleagues, volunteers and students
- Actively participate in workplace, departmental and job-specific health and safety orientation, education and training
- Use or wear any equipment, protective devices or clothing required by the employer
- Operate any equipment and work in a way that does not endanger self or any other worker
- Comply with established policies, procedure and work practices regarding health and safety
- Identify and report workplace and job hazards, defects and contraventions of the Act to the supervisor or employer
- Report health and safety problems to the supervisor or employer
- Notify the supervisor if clarification of a policy, procedure or safe work practice is needed
- Use initiative to reduce risk and apply discretion to solve problems, within scope of authority
- Work co-operatively with co-workers, supervisor, Joint Health and Safety Committee members and others

6. Client Safety

Adhere to C.M.H.A. H.K.P.R. client safety programs including program policies as well as infection control and prevention procedures. In partnership with clients, family members, and fellow staff, maintain open lines of communication to assist the organization in identifying and achieving quality outcomes for client safety. Report client safety incidents and suggested improvements to manager or delegate.

7. Other Duties as Assigned

- Attend, participate in team/staff meetings, and all-staff meetings as required
- Participate in agency quality improvement activities, e.g. accreditation projects, Information Systems Support and Privacy and Security committees, special events, etc.
- Participate in quality improvement activities at the team/program level



- Participate in external committees as required
- Duties may change from time to time

Requirements of the Position:

A: Education and Training

Completion of post-secondary diploma or degree program in business administration, accounting, and/or social services.

We recognize that mandatory training before hire is an asset, however, successful completion of the training applicable to this role shall be requirements for continued employment in this position:

- Health and Safety Training (including but not limited to the following):
 - Globally Harmonized System (previously W.H.M.I.S.)
 - Infection, Prevention & Control
 - Workplace Violence
 - Accessibility for Ontarians with Disabilities Act
- Applied Suicide Intervention Skills Training
- Non Violent Crisis Intervention
- First Aid/C.P.R.

Assets with regard to this position:

- n/a

B: Related and Relevant Experience

Mandatory experience

- 2 to 3 years' experience in bookkeeping/personal finance
- Demonstrate organizational and time management skills, accountability, reliability, punctuality, attention to detail



Preferred experience

- Experience working within mental health system
- Knowledge of Ontario Disability Support Program (O.D.S.P), Ontario Works (O.W.), Canadian Pension Plan (C.P.P.) services and program directives

C: Competencies

See Appendix A.

D: Other

- Satisfactory police records search and vulnerable sector screening
- Satisfactory references

Working Conditions:

- Regularly works in an office setting during regular business hours
- Works directly with individuals living in poverty who may live with a with serious mental illness and/or dual diagnosis and/or addictions
- There are multiple competing demands which require time management skills, the ability to be flexible and to prioritize

Approval/Revised Approval Dates:

Program Manager _____ Date _____

I have read and understood the above position description.

Employee Signature

Date