

# Role Description

## Manager Practice & Strategy

Cluster	Stronger Communities
Agency	NSW Trustee & Guardian
Division/Branch/Unit	Trustee Services/Estate Management/Practice & Strategy
Role number	TBA
Classification/Grade/Band	Clerk Grade 9/10
Senior executive work level standards	Not Applicable
ANZSCO Code	139999
PCAT Code	2311392
Date of Approval	November 2021
Agency Website	<a href="http://www.taq.nsw.gov.au">www.taq.nsw.gov.au</a>

### Agency overview

NSW Trustee & Guardian protects, promotes and supports the rights, dignity, choices and wishes of the people of NSW. The agency supports the Chief Executive Officer and the Public Guardian to provide customer-centred services to the people of NSW, including some of the state's most vulnerable. We do this by providing a range of multidisciplinary services including Will-making, estate planning, executorship, trustee, financial management and guardianship services.

We write more than 13,000 estate planning documents each year, support over 47,000 customers annually and manage over six billion dollars in customer assets. A NSW government agency within the Stronger Communities Cluster, our services help support and protect people at critical moments in their lives.

### Division overview

NSW Trustee & Guardian can be appointed by a court or tribunal to manage a person's financial affairs if their decision-making ability is impaired due to disability, age, mental illness or injury. Our Estate Management teams deliver high quality financial management services to customers through our Foundation Team, Proactive Customer Management Team and Customer Independence and Support Team.

### Primary purpose of the role

Support the delivery of quality estate management services to our customers with the aim of achieving the best possible outcomes for people with disability consistent with the Principles of the *NSW Trustee and Guardian Act 2009* and the National Standards for Financial Managers. This is achieved through ensuring the Estate Management division, and wider NSW Trustee & Guardian, can access up to date and relevant financial management knowledge and information, including the key issues across sectors that impact financial management and its effect on people with disability. Key to the role is the ability to effectively consult with estate management teams to continually review and improve estate management practices, protocols and policy.

## Key accountabilities

- Coordinate and oversee the effectiveness of policies and procedures relating to financial management and where gaps are identified develop solutions for development or update and implementation.
- Oversee the work of the practice leads and project officer to ensure delivery of key outcomes in line with project deliverables, identified division and strategic needs.
- Identify and implement practices within the division that promote positive customer outcomes and align to the Customer Excellence Principles in the delivery of services.
- Monitor current information and issues that impact the sectors NSW Trustee & Guardian intersects with, the work of Estate Management and how services are delivered. Use this information to provide summaries of key issues to the division and how they impact estate management practice.
- Identify training needs or gaps for the division and propose solutions on how we will deliver training or identify opportunities or partnerships.
- Scope quality assurance mechanisms that can be embedded for estate management practice and promote better customer outcomes. Coordinate the delivery of audit recommendations and reporting to the Operations Management Group for Estate Management.
- Support the Directors Estate Management and Estate Planning & Administration and their Leadership Teams to coordinate submissions, briefs, reports, and requests of information from external agencies.
- Develop and maintain collaborative networks across NSW Trustee & Guardian and the Cluster where relevant, to support positive outcomes for customers and the effective delivery of services. Act as the primary point of contact for the Information and Technology Division to undertake data governance and technology-related project work.

## Key challenges

- Anticipate and understand contentious issues and interpret information quickly.
- Work effectively with a diverse range of customers and stakeholders.
- Be able to meet strict deadlines and prioritise work as required.

## Key relationships

Who	Why
<b>Internal</b>	
Director, Estate Management, Director, Estate Planning & Administration, and Leadership Teams	<ul style="list-style-type: none"> <li>• Work collaboratively to take a whole of organisation approach to improving operations and customer experience, while ensuring the optimal functioning of Trustee Services.</li> </ul>
Senior Manager, Practice & Strategy	<ul style="list-style-type: none"> <li>• Report directly to, provide advice and receive direction.</li> </ul>
Direct reports	<ul style="list-style-type: none"> <li>• Provide advice, leadership and support.</li> </ul>
Estate Management, Estates Planning & Administration teams	<ul style="list-style-type: none"> <li>• Consult with teams to continually review and improve practices, protocols and policy.</li> </ul>
NSWTG divisions	<ul style="list-style-type: none"> <li>• Work collaboratively to ensure the ease in sharing information regarding issues relating to estate management is seamless and working effectively.</li> </ul>

Who	Why
<b>External</b>	
Stronger Communities Cluster agencies	<ul style="list-style-type: none"> <li>Develop and maintain collaborative networks across the Cluster where relevant, to support positive outcomes for customers and the effective delivery of services.</li> </ul>

## Role dimensions

### Decision making

This role has autonomy in decision making in line with NSW Trustee & Guardian operational and financial delegations, including the financial management delegations.

### Reporting line

The role reports to the Senior Manager, Practice & Strategy.

### Direct reports

The role has up to eight direct reports.

### Budget/Expenditure

Nil

## Essential requirements

- Demonstrated leadership and management skills for the delivery of services in a complex human services customer environment and sound strategic thinking capacity, management and administrative skills.
- Tertiary qualifications and/or equivalent experience in human services or related discipline.
- Understanding of NSW Trustee & Guardian's key services and customer base including experience working and/or supporting people with disability, vulnerable or older people.
- Available to travel throughout NSW.
- Willingness to have phone calls and team email accounts monitored for quality assurance and training purposes, and to participate in one to one review sessions for calls and emails.

## Checks and Clearances

Appointments are subject to reference checks. Some roles may also require the following checks/ clearances: National Criminal History Record Check in accordance with the Disability Inclusion Act 2014.

Working with Children Check clearance in accordance with the Child Protection (Working with Children) Act 2012.

## Capabilities for the role

The [NSW public sector capability framework](#) describes the capabilities (knowledge, skills and abilities) needed to perform a role. There are four main groups of capabilities: personal attributes, relationships, results and business enablers, with a fifth people management group of capabilities for roles with managerial responsibilities. These groups, combined with capabilities drawn from occupation-specific capability sets where relevant, work together to provide an understanding of the capabilities needed for the role.

The capabilities are separated into **focus capabilities** and **complementary capabilities**.

## Focus capabilities

*Focus capabilities* are the capabilities considered the most important for effective performance of the role. These capabilities will be assessed at recruitment.

The focus capabilities for this role are shown below with a brief explanation of what each capability covers and the indicators describing the types of behaviours expected at each level.

FOCUS CAPABILITIES			
Capability group/sets	Capability name	Behavioural indicators	Level
 Personal Attributes	<b>Act with Integrity</b> Be ethical and professional, and uphold and promote the public sector values	<ul style="list-style-type: none"> <li>• Represent the organisation in an honest, ethical and professional way and encourage others to do so</li> <li>• Act professionally and support a culture of integrity</li> <li>• Identify and explain ethical issues and set an example for others to follow</li> <li>• Ensure that others are aware of and understand the legislation and policy framework within which they operate</li> <li>• Act to prevent and report misconduct and illegal and inappropriate behaviour</li> </ul>	Adept
	<b>Manage Self</b> Show drive and motivation, an ability to self-reflect and a commitment to learning	<ul style="list-style-type: none"> <li>• Keep up to date with relevant contemporary knowledge and practices</li> <li>• Look for and take advantage of opportunities to learn new skills and develop strengths</li> <li>• Show commitment to achieving challenging goals</li> <li>• Examine and reflect on own performance</li> <li>• Seek and respond positively to constructive feedback and guidance</li> <li>• Demonstrate and maintain a high level of personal motivation</li> </ul>	Adept
 Relationships	<b>Commit to Customer Service</b> Provide customer-focused services in line with public sector and organisational objectives	<ul style="list-style-type: none"> <li>• Take responsibility for delivering high-quality customer-focused services</li> <li>• Design processes and policies based on the customer's point of view and needs</li> <li>• Understand and measure what is important to customers</li> <li>• Use data and information to monitor and improve customer service delivery</li> <li>• Find opportunities to cooperate with internal and external stakeholders to improve outcomes for customers</li> <li>• Maintain relationships with key customers in area of expertise</li> <li>• Connect and collaborate with relevant customers within the community</li> </ul>	Adept

<p><b>Influence and Negotiate</b> Gain consensus and commitment from others, and resolve issues and conflicts</p>	<ul style="list-style-type: none"> <li>• Influence others with a fair and considered approach and present persuasive counter-arguments</li> <li>• Work towards mutually beneficial 'win-win' outcomes</li> <li>• Show sensitivity and understanding in resolving acute and complex conflicts and differences</li> <li>• Identify key stakeholders and gain their support in advance</li> <li>• Establish a clear negotiation position based on research, a firm grasp of key issues, likely arguments, points of difference and areas for compromise</li> <li>• Anticipate and minimise conflict within the organisation and with external stakeholders</li> </ul>	Advanced	
<p><b>Plan and Prioritise</b> Plan to achieve priority outcomes and respond flexibly to changing circumstances</p>	<ul style="list-style-type: none"> <li>• Consider the future aims and goals of the team, unit and organisation when prioritising own and others' work</li> <li>• Initiate, prioritise, consult on and develop team and unit goals, strategies and plans</li> <li>• Anticipate and assess the impact of changes, including government policy and economic conditions, on team and unit objectives and initiate appropriate responses</li> <li>• Ensure current work plans and activities support and are consistent with organisational change initiatives</li> <li>• Evaluate outcomes and adjust future plans accordingly</li> </ul>	Adept	
	<p><b>Think and Solve Problems</b> Think, analyse and consider the broader context to develop practical solutions</p>	<ul style="list-style-type: none"> <li>• Research and apply critical thinking techniques in analysing information, identify interrelationships and make recommendations based on relevant evidence</li> <li>• Anticipate, identify and address issues and potential problems that may have an impact on organisational objectives and the user experience</li> <li>• Apply creative-thinking techniques to generate new ideas and options to address issues and improve the user experience</li> <li>• Seek contributions and ideas from people with diverse backgrounds and experience</li> <li>• Participate in and contribute to team or unit initiatives to resolve common issues or barriers to effectiveness</li> <li>• Identify and share business process improvements to enhance effectiveness</li> </ul>	Adept



### Project Management

Understand and apply effective planning, coordination and control methods

- Understand all components of the project management process, including the need to consider change management to realise business benefits
- Prepare clear project proposals and accurate estimates of required costs and resources
- Establish performance outcomes and measures for key project goals, and define monitoring, reporting and communication requirements
- Identify and evaluate risks associated with the project and develop mitigation strategies
- Identify and consult stakeholders to inform the project strategy
- Communicate the project's objectives and its expected benefits
- Monitor the completion of project milestones against goals and take necessary action
- Evaluate progress and identify improvements to inform future projects

Adept



### Manage and Develop People

Engage and motivate staff, and develop capability and potential in others

- Refine roles and responsibilities over time to achieve better business outcomes
- Recognise talent, develop team capability and undertake succession planning
- Coach and mentor staff and encourage professional development and continuous learning
- Prioritise addressing and resolving team and individual performance issues and ensure that this approach is cascaded throughout the organisation
- Implement performance development frameworks to align workforce capability with the organisation's current and future priorities and objectives

Advanced

### Inspire Direction and Purpose

Communicate goals, priorities and vision, and recognise achievements

- Assist the team or unit to understand organisational directions and explain the reasons behind decisions
- Ensure that team and unit objectives lead to the achievement of business outcomes that align with organisational policies
- Ensure team members understand how their activities create value for the organisation, customers and stakeholders
- Encourage team members to strive for ongoing performance improvement
- Recognise and acknowledge high individual and team performance

Intermediate

## Complementary capabilities

*Complementary capabilities* are also identified from the Capability Framework and relevant occupation-specific capability sets. They are important to identifying performance required for the role and development opportunities.

Note: capabilities listed as 'not essential' for this role are not relevant for recruitment purposes however may be relevant for future career development.

COMPLEMENTARY CAPABILITIES			
Capability group/sets	Capability name	Description	Level
 Personal Attributes	Display Resilience and Courage	Be open and honest, prepared to express your views, and willing to accept and commit to change	Adept
	Value Diversity and Inclusion	Demonstrate inclusive behaviour and show respect for diverse backgrounds, experiences and perspectives	Intermediate
 Relationships	Communicate Effectively	Communicate clearly, actively listen to others, and respond with understanding and respect	Adept
	Work Collaboratively	Collaborate with others and value their contribution	Adept
 Results	Deliver Results	Achieve results through the efficient use of resources and a commitment to quality outcomes	Intermediate
	Demonstrate Accountability	Be proactive and responsible for own actions, and adhere to legislation, policy and guidelines	Adept
 Business Enablers	Finance	Understand and apply financial processes to achieve value for money and minimise financial risk	Intermediate
	Procurement and Contract Management	Understand and apply procurement processes to ensure effective purchasing and contract performance	Intermediate
	Technology	Understand and use available technologies to maximise efficiencies and effectiveness	Intermediate
 People Management	Optimise Business Outcomes	Manage people and resources effectively to achieve public value	Intermediate
	Manage Reform and Change	Support, promote and champion change, and assist others to engage with change	Intermediate