

POSITION DESCRIPTION

Contract & Client Refund Coordinator - Retirement Living

Wesley Senior Services

May 2025

Agreement

Name: _____

Contracts & Client Refund Coordinator

Name: _____

Supervisor

Signed: _____

Signed: _____

Date :

Date :

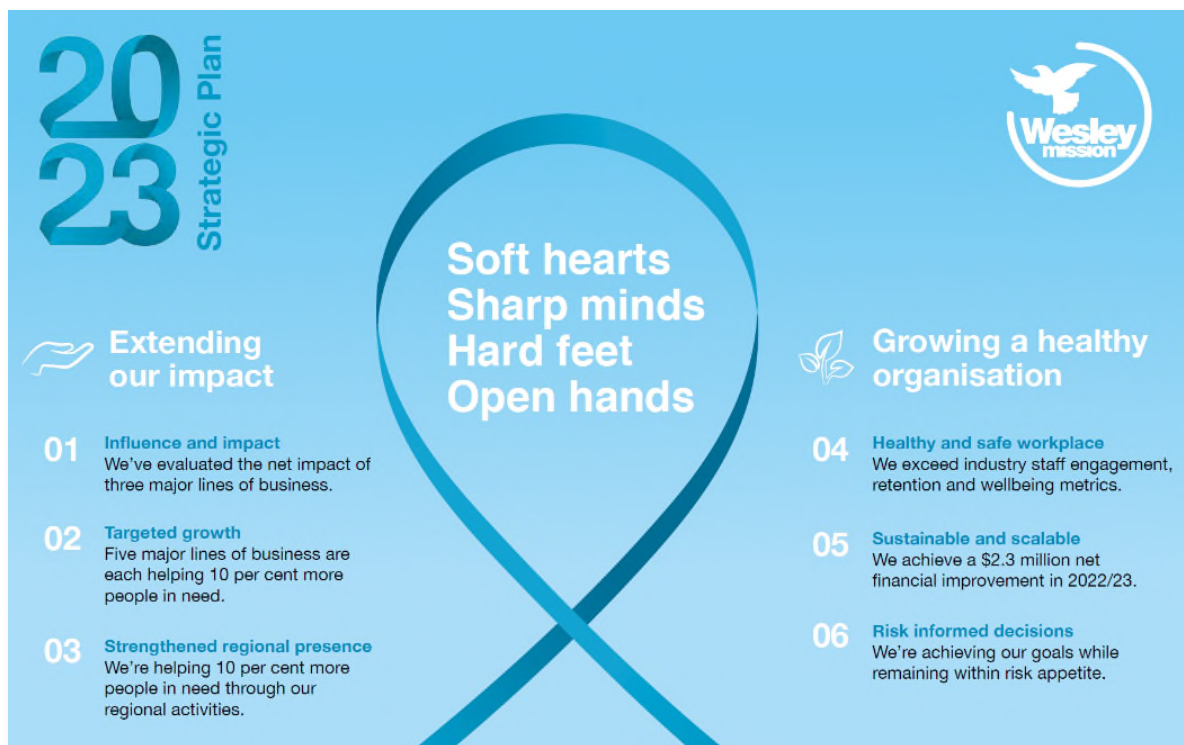


Contract & Client Refund Coordinator - Retirement Living

1. Wesley Mission

Wesley Community Services Limited, operating as Wesley Mission, is a company limited by guarantee and a Public Benevolent Institution. Our Purpose is to *conceive, develop and deliver services and programs to provide direct relief of poverty, sickness, suffering, distress, adversity, disability, destitution, and helplessness in New South Wales and other parts of Australia.*

This Purpose aligns with our Mission, which is *Continuing the work of Jesus Christ in Word and deed* and our Vision to *Do all the good we can, by all the means we can, in all the ways we can, in all the places we can, at all the times we can, to all the people we can, as long as ever we can.*



Wesley Mission's strategic plan sets expectations for how we will achieve the Mission, Vision and Purpose.

It calls on us to be **Extending our Impact** and **Growing a Healthy Organisation**. In meeting those expectations, our behaviour is guided by three core Values: *Christlike Servanthood, Unfailing Integrity and Courageous Commitment.*

2. Overview of Contract & Client Refund Coordinator - Retirement Living

The operational work of Wesley Mission includes a variety of community service portfolios that are amongst the most diverse of any Australian organisation.

The Contract & Client Refund Coordinator - Retirement Living has a crucial role in ensuring adherence to Wesley Mission, Wesley Mission Retirement Living and relevant legislative guidelines, procedures and standards. This position contributes to the effective and efficient operation of Wesley Retirement Living services through delivery of financial and administrative processes and controls, ensuring resident information is established accurately, and final refund payments are completed in a timely manner.

The Contract & Client Refund Coordinator supports sales and village staff to deliver on Wesley Retirement Living KPIs, and relevant NSW government legislations and guidelines.

The Contract & Client Refund Coordinator - Retirement Living reports to the Retirement Living QRC & WHS Lead. This role works with their peers across Wesley Retirement Living to meet financial, organisational and cultural KPIs.

3. Overview of role

The Contracts & Client Refund Coordinator is responsible and accountable for the drafting of new resident contracts, establishing the necessary records for resident management and financial transactions, and also the refunding of any monies owing to the resident on exit from Wesley Retirement Living properties.

The Contracts & Client Refund Coordinator possesses a keen eye for details, empathetic and effective customer engagement and management skills, an ability to work well within financial and Client Management systems, and possesses an understanding of accounting principles. They will develop a strong understanding of Wesley Mission Systems and processes to effect the duties of their role. They will build and maintain comprehensive knowledge the relevant systems and regulations encumbering their role.

Their ethics will align with Wesley Mission and they will lead with honesty and integrity. They work with a multisite multidisciplinary team, and are responsible for achieving monthly, quarterly and annual KPIs.

This role will be measured by its ability to complete tasks accurately and in a timely manner, and to manage workloads so as to meet defined KPIs and critical deadlines.

This role may be delegated other tasks within the scope of their skillset, from time to time as the needs arise.

Work between Wesley Mission's two Retirement Living Villages at Sylvania and Carlingford may be required from time to time.

4. Relationships and Reporting

4.1 Wesley Mission and Uniting Church Relationships

Supervisor: Retirement Living QRC & WHS Lead

This role works within a Wesley Mission site and is expected to display a healthy work and interpersonal ethic at all times.

The Contracts & Client Refund Coordinator has no direct reports, and will work collaboratively with staff from the Retirement Living Sales team, and Retirement Living villages.

They are measured monthly through operational reviews with their direct supervisor, against the requirements and KPIs of the business.

They are measured and report monthly on their “cross unit collaboration” and proactive relationships outside the HCE portfolio.

The Contracts & Client Refund Coordinator will need to liaise with residents of Wesley Retirement Living, and with relatives and/or financial and legal representatives when residents exit Wesley Retirement Living Villages. At the request of Village or other Managers, they may be invited to attend Staff and Village Meetings, and other special projects as requested.

The Contracts & Client Refund Coordinator is expected to contribute to, and participate in, activities of the Uniting Church in Australia. This includes attendance at requested Wesley Mission events, and other team and ancillary activities.

4.2 Reporting

The Contracts & Client Refund Coordinator prepares monthly and ad-hoc reports requested by their supervisor or other senior staff, outlining work activities and outputs against defined KPIs. They are directly responsible for:

Report	Description	Frequency
Annual Performance Review	Complete, sign and add to the personnel file Employee Contribution and Development Reviews for all direct reports	Annually
Monthly activity reports	Prepare, contribute to and submit RV reports around new resident entries, refunds upcoming and refunds completed.	Monthly and as required
Adhoc Reporting	As required and requested, provide reporting on contracts, billing and refund activities associated with the role	As required

5. Organisational responsibilities

5.1 Strategic goals

The Contract & Client Refund Coordinator - Retirement Living

CRM System	Maintain accurate and current resident and financial information within Wesley Missions OneVillage CRM system, providing reports as required to meet Wesley Missions organisational objectives.
Meeting organisational and service deadlines	Ensuring residents contracts and CRM records are established within the required timeframes, and that refunds to exited residents and/or their estates are tracked and completed within required timeframes
Accurate data for Management Reporting	Maintaining accurate CRM data to enable effective reporting of data by Retirement Living Management.
Financial Accountability	Through CRM and Peoplesoft data entry, provide authentic financial data for the effective operation and reporting on Wesley Retirement Living Services.

5.2 Professional responsibilities

Professional and personal responsibilities of all senior staff include:

Soft Hearts	We put people first. We are here to show love, compassion, respect and gentleness in the way we care for each other and the people we serve. We aim to make a residents transition through retirement an enjoyable and supported experience
Sharp Minds	We challenge the status quo and share bold ideas. We find new ways to respond to people's needs and to pursue justice. Best practice and continuous improvement supports better processes for Wesley Mission, and better experiences for our resident.
Hard Feet	We persevere. We speak up for those who do not feel heard, raise our voice on what matters and go to the fringes to serve people from all walks of life. We will support our residents until solutions are achieved.
Open Hearts	We are passionate about extending our legacy together. We want to see real change and to "be the change" that helps people most in need. Our residents will judge us by their experience in our villages and their feedback.
Code of Conduct	The Wesley Mission Code of Conduct contains essential information and requirements for all roles. Ensure you and your workers sign and comply with the Code of Conduct.
Management direction	Operate at all times within the current Chart of Delegations and in accord with instructions provided by your supervisor. Undertake other duties to support the Purpose, Mission, Vision, Values, annual business plans and Strategic Plan as directed by your supervisor.

We have organisation wide responsibilities to:

- be responsible under the Work Health & Safety Act for the health and safety of all persons they come into contact with, during employment. Report all hazards and injuries through the normal process as set out in Wesley Mission's Work Health, Safety and Rehabilitation Quality Management System and site procedures
- participate in the review and maintenance of industry specific and internal audit processes, as per Wesley Mission's standard policy and procedures
- in relation to Wesley Mission and the Uniting Church in Australia, attend such functions, meetings, seminars, training courses as directed by your supervisor
- in relation to Wesley Mission attend worship services as encouraged by your supervisor
- participate on an annual basis in Wesley Mission's Employee contribution and development process
- take responsibility for personal career development and training
- participate in Wesley Mission's Orientation program, so as to gain an understanding of, and promote, the application of the EEO, Affirmative Action, Privacy Act, Work Health & Safety Act and other relevant legislation
- administer Wesley Mission's philosophy of care and other relevant policy documents as appropriate
- demonstrate responsible stewardship of all resources, and willingness to report impropriety in keeping with the values of Wesley Mission
- ensure the reputation and integrity of Wesley Mission is maintained at all times
- maintain confidentiality.

Major role responsibilities

5.3 Our clients

So that Wesley Mission achieves outstanding results for the clients, guests and customers who engage in our services the Contracts & Client Refund Coordinator will:

Assist clients	Support clients through the commencement of their journey with Wesley Retirement Living, and provide empathetic and efficient services to clients and their families when they eventually depart Wesley Retirement Living
Client outcomes	By maintaining accurate and efficient records, contribute to a stress free and enjoyable client experience with Wesley Retirement Living.
Client safety	Maintain secure records in line with established privacy principles to provide a secure experience for clients with Wesley Retirement Living

5.4 Our people (includes staff and volunteers)

So that Wesley Mission is an employer of choice for values driven staff, the Contracts & Client Refund Coordinator will:

Culture	Ensure you and your co-workers act in accordance with Wesley Mission's Code of Conduct, Mission, Purpose, Vision and Values. Share, and enable the sharing of, our history and stories. Celebrate success by giving personal and public praise.
Orientation and Induction	Complete Wesley Mission's mandatory induction and orientation programs, and pre-employment checks and probation period processes are followed.
Workforce development	Offer advice and guidance on the processes involved in the role to relevant staff, so that the duties of the role can be seen as the important part of the resident journey that it is.
Healthy workforce	Contribute to Workplace Health & Safety within the service through active contribution to reviews, surveys and staff meetings, and by reporting of key WHS impacts on the services. Ensure all hazards and injuries are reported in accordance with Work Health and Safety procedures
Wesley Mission engagement	Attend functions, meetings, seminars, training courses and worship services as directed by your supervisor.
Staff feedback	Personally participate in organisational voice surveys and follow-up surveys. Through surveys and other mechanisms, identify and voice concerns workers may have.

5.5 Our operations

So that Wesley Mission upholds and strengthens the reputation earned by pioneering a diverse range of services for the most vulnerable members of our society, the Contracts & Client Refund Coordinator will:

Information management	Ensure that information systems used in Retirement Living, and WHS related systems used in the HCE portfolio are accurate and fit for purpose
Wesley Mission marketing	Ensure accurate data is maintained to support production of data driven reports which are used in and drive our marketing and sales strategies and processes
Data Integrity	Maintain up to date and accurate client information to support Wesley Retirement Living management and operations.
Financial Management	Maintain accurate financial data and prepare accurate and complete financial reports and documents to steward Wesley Mission's finances well.
Continuous improvement and Risk Management	Contribute to a strong quality and continuous improvement focus within Portfolio. Identify and contribute to mitigate risks to support a safe and desirable workplace.

Policies and procedures	Gain and maintain a good knowledge of Wesley Mission and Wesley Retirement Living policies and procedures, and contribute towards their continuous improvement.
External Stakeholders	Deal effectively, efficiently and sensitively with external stakeholders including families, legal representatives and estate managers.

5.6 Our financials

So that Wesley Mission operates in a way that enables us to sustain our work for another 200 years, the Contracts & Client Refund Coordinator will:

Financial Settings Processes	Participate in the setting of Retirement Living budgets, and support Retirement Living management and staff to achieve budgeted targets whilst maintaining compliance to relevant legislations and Wesley Mission / Retirement Living Strategic Plans.
Financial accountability	Support Retirement Living to be effective stewards of Wesley Mission finances and assets. Participate in regular financial discussions to improve the financial position of Wesley Retirement Living.
Contracts & CRM	Ensuring data in both contracts and CRM is accurate to allow for real-time evaluation of our services financial position.
Refunds	Ensuring refunds account for all billing and credit activities for the benefit of Wesley Mission and the peace of mind for our residents and their families

5.7 Performance Measures

So that Wesley Mission operates in a way that enables us to sustain our work for another 200 years, the Contracts & Client Refund Coordinator will:

Timeframes and Deadlines	<p>Contracts and associated documents are generated, distributed and signed off in a timely manner, allowing residents to settle in their accommodation within the defined timeframes.</p> <p>CRM and Peoplesoft information is established before a resident enters the village. CRM data is updated where changes to living arrangements take place.</p> <p>Refunds are tracked and processed within the legislative timeframes.</p> <p>Refund balancing transactions are completed as soon after exit as possible to support effective management of Village debtor lists.</p>
Reporting	Planned and adhoc reports are provided within pre-defined and reasonable timeframes.
Audit Documentation	Documents required for audit purposes are maintained in real-time, and provided to Wesley Mission financial staff when requested.

6. Selection criteria

The Contract & Client Billing Coordinator must possess the following:

Demonstrated behaviours

- The ability to work across and from multiple sites, prioritising workload to meet demand and deadlines
- Demonstrated experience with interpreting legislative guidelines and regulations
- Willingness to affirm Wesley Mission's vision, mission and values and enthusiastically advocate our Word and deed ministry
- Ability to build effective relationships with direct and indirect team members
- Empathy and understanding to deal with potentially difficult situations when a resident leaves the village
- An ability to adapt to changing demands and priorities with quick response times

Essential skills/knowledge

- Experience working within financial systems and undertaking financial calculations
- Sound numeracy skills
- Ability to operate electronic financial and Client Record Management systems
- An understanding of retirement villages and the importance of their part in the lives of residents and their families
- Ability to work to direction, and to work to instructions when required.
- Ability to follow detailed organisational and legislative guidelines and processes
- Ability to interpret contracts
- Effective communication skills to liaise with residents, families, estates and debtors

Desirable skills/knowledge

- An understanding of NSW Retirement Village Legislation, specifically around fees, charges and refunds
- Finance or accounts related qualifications
- Current NSW Class C Drivers Licence