



FINANCIAL COUNSELLORS' ASSOCIATION
OF WESTERN AUSTRALIA

Strategic Plan 2018-2020

Strategic Plan 2018 - 2019

OUR VISION

Access to quality financial counselling and support for West Australians.

OUR MISSION

To ensure equitable access to free, independent and quality financial counselling and advocacy to families and individuals in West Australia.

OUR VALUES

The FCAWA aims to demonstrate and embed in our services, management practices and stakeholder relations, the following values:

- ❖ *Social Justice;*
- ❖ *Respect;*
- ❖ *Empowerment;*
- ❖ *Integrity;*
- ❖ *Collaboration; and;*
- ❖ *Excellence.*

KEY FOCUS AREAS

MEMBER AND SECTOR DEVELOPMENT

Financial Counsellors provide professional advice through accredited training and other quality member and sector development services.

POLICY AND ADVOCACY

FCAWA is the key source of information, advocacy and service navigation for financial services and public policy for families and individuals in financial hardship in Western Australia.

COMMUNITY SERVICES

The Western Australian community is better informed and educated on strategies and measures to more effectively manage their financial situation.

ORGANISATIONAL CAPABILITY

FCAWA is a well governed and professional organisation delivering quality services to its members and the people of Western Australia.

Strategies

MEMBER AND SECTOR DEVELOPMENT

Financial Counsellors provide professional advice through accredited training and other quality member and sector development services.

- 1. Provide accredited skills training workshops to financial counsellors on topics of relevance and need, in line with national standards, the code of ethics and the requirements of the ASIC Corporations (Financial Counselling Agencies) Instrument 2017/792.*
- 2. Facilitate, in partnership with external organisations (e.g. other peak bodies, service providers and academic institutions), accredited external professional development skills workshops and other training events.*
- 3. Provide professional advice services such as legal advice to financial counsellor members of the association.*
- 4. Conduct an annual conference providing networking, information, policy and professional development opportunities for members, community sector workers and service representatives from throughout Western Australia.*
- 5. Provide training, events and resources that support the employment and management of financial counsellors in not-for-profit organisations in WA.*
- 6. Develop in partnership with service providers, consumers and research institutions tools for continuous improvement in service delivery models, practice and service standards.*

Strategies

POLICY AND ADVOCACY

FCAWA is the key source of information, advocacy and service navigation on Financial services and public policy for families and individuals in financial hardship in Western Australia

- 1. Advocate for effective and just policies and practices in financial matters to decision-makers, the financial sector, service organisations and the public.*
- 2. Develop policy papers and positions on relevant issues of financial hardship, law reform and service needs in Western Australia.*
- 3. Participate in state and national initiatives that ensure the ongoing development and maintenance of national standards and the code of ethics in financial counselling services.*
- 4. Participate on relevant government and industry working parties, committees and events aimed at developing better services and public policy on financial hardship and economic management.*
- 5. Form partnerships with service organisations, peak bodies, business organisations and academic institutions in undertaking research and developing effective and just policies and service responses to the needs of people in economic hardship.*
- 6. Facilitate the development of services systems analysis supporting the equitable access to financial counselling services for people in hardship throughout Western Australia.*
- 7. Engage effectively with key stakeholders through national networks and peak bodies on public policy issues of common interest across the States and Territories of Australia.*

Strategies

COMMUNITY SERVICES

The Western Australian community is better informed and educated on strategies and measures to more effectively manage their financial situation

- 1. Develop community education resources on financial services and consumers rights and responsibilities on the most relevant issues and services that result in financial hardship for low and middle income West Australians.*
- 2. Engage in Community Education Campaigns to offer support services and raise awareness of unscrupulous or fraudulent practices that lead to financial hardship.*
- 3. Ensure the provision of information and crisis support services to consumers through state and national help lines aimed at alleviating financial hardship.*
- 4. Facilitate the referral of inquiries for financial advice to accredited financial counsellors across Western Australia.*
- 5. Develop relevant and accessible financial literacy tools and resources to assist consumers especially those from high risk and need cohorts.*

Strategies

ORGANISATIONAL CAPABILITY

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- 1. Maintain quality and efficient administrative, financial and management systems that meet the performance and accountability requirements of funders and regulators.*
- 2. Upgrade and maintain the Information Communication and Technology systems to provide the capability to meet information, service navigation, individualised services, innovative programs and other strategic needs of the organisation.*
- 3. Actively recruit and support skilled staff that are recognised for their expertise and capabilities in service delivery, leadership and collaboration in the financial and community services sectors.*
- 4. Form strategic partnerships and alliances to support organisational sustainability, service growth strategies, diversified income sources and reduced business costs.*
- 5. Develop effective organisational governance structures that provide opportunities for effective member participation, input and oversight of the diverse activities of the organisation.*



OUR KEY STAKEHOLDERS

- ❖ Our employees
- ❖ Our clients
- ❖ Financial Counsellors
- ❖ Funders
- ❖ Employing agencies
- ❖ Peak bodies including WACOSS and FCA
- ❖ Media
- ❖ Regulatory bodies
- ❖ State and Commonwealth Ombudsman's
- ❖ Credit providers
- ❖ Utilities
- ❖ Relevant government departments and respective Ministers

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OUR VISION
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- OUR VALUES**
- Social Justice
 - Respect
 - Empowerment
 - Integrity
 - Collaboration
 - Excellence

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