

## Westhaven

Our Vision – Live how you choose Our Core Values – C.H.O.I.C.E
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<b>Position Title</b>	<b>Client Onboarding Manager</b>	<b>Reports to</b>	Commercial Manager		
<b>Number of Direct Reports</b>	1+	<b>Position Location</b>	Dubbo, Orange or Bathurst	<b>Version</b>	1
<b>Operating Environment</b>	Westhaven Operating Environment across Dubbo, Orange, Bathurst, Wagga and Broken Hill	<b>Revenue and Cost</b>	To be agreed		

### Purpose of the position

The Client Onboarding Manager is a pivotal role responsible for ensuring a seamless and positive onboarding experience for new participants. This role is crucial for the growth and sustainability of Westhaven. The Manager will lead a team of Onboarding Officers, fostering a collaborative and efficient working environment driven by data and clearly defined processes. This role has two focus areas:

- Ensuring clients' NDIS plans adequately support their service delivery, and
- Managing the onboarding and facilitation of a smooth transition into Westhaven's services for new clients.

### Decision making

- The Client Onboarding Manager has financial and staffing delegations detailed in the Westhaven Delegation Schedule
- The Client Onboarding Manager operates within the context of agreed priorities and defined delegations and works collaboratively with the Commercial Manager and other members of the Service Delivery, Rostering and BFT team. Relevant frameworks for decision-making include Westhaven Strategic Plans, contracts of service and this position description.

Key Accountability Descriptor	Responsibilities
<i>Client Acquisition</i>	<ul style="list-style-type: none"> <li>• Partner with EHS and the Client Engagement &amp; Acquisition Officer to conduct consultations with potential clients and their families to understand their needs, explain our services and provide support during assessment and transition processes.</li> <li>• Manage the team to be the single point of contact for all external communications acting as a go between Westhaven teams (e.g. Finance) and clients, their representatives or Service Coordinators to ensure consistent and a high level of customer service.</li> </ul>
<i>Client Onboarding and Service Transition</i>	<ul style="list-style-type: none"> <li>• Manage the end-to-end onboarding process, ensuring a smooth and timely transition for new clients.</li> <li>• Ensure accurate and complete documentation of client information and NDIS plan details, including completion of internal reporting and processes.</li> <li>• Ensure appropriate risk assessments have been completed and mitigation strategies documented.</li> <li>• Verify that client NDIS plans contain adequate funding for the required services.</li> <li>• Liaise with internal teams (e.g. Service Delivery, Service Scheduling, BFT, Zapti) to coordinate service commencement.</li> <li>• Develop and implement onboarding procedures and protocols to enhance efficiency and consistency.</li> <li>• Provide ongoing support to new clients and their families during the initial service period.</li> <li>• Address and resolve any onboarding-related issues or concerns promptly and effectively.</li> </ul>
<i>NDIA submission, applications &amp; evidence</i>	<ul style="list-style-type: none"> <li>• Manage participant change of circumstances applications</li> <li>• Review and coordinate documentation for SIL submissions</li> <li>• Work with BFT to monitor funding discrepancies and follow a timely escalation process</li> <li>• Liaise with Commercial Manager &amp; BFT to mitigate funding shortfalls</li> <li>• Review NDIA submissions and ensure all evidence is complete and of high quality</li> <li>• Plan, monitor and ensure the smooth transition of CYPs to NDIS SIL placements</li> </ul>
<i>Client Satisfaction &amp; Retention</i>	<ul style="list-style-type: none"> <li>• Manage the offboarding process for clients leaving the service, ensuring a respectful and efficient transition.</li> </ul>

	<ul style="list-style-type: none"> <li>• Conduct exit interviews or surveys to determine the reasons for client offboarding.</li> <li>• Analyse offboarding data to identify trends and areas for improvement in service delivery.</li> <li>• Develop and implement strategies to improve client retention.</li> <li>• Document and report on offboarding trends and feedback to senior management.</li> <li>• Ensure that offboarding processes are in compliance with all relevant NDIS guidelines.</li> </ul>
<i>Participant Satisfaction and Service Improvement:</i>	<ul style="list-style-type: none"> <li>• Develop and implement mechanisms to monitor participant satisfaction, including surveys, feedback forms, and regular check-ins.</li> <li>• Proactively identify and address areas of concern that may lead to client dissatisfaction or offboarding.</li> <li>• Escalate significant concerns or trends to senior management for review and action.</li> <li>• Use participant feedback to drive continuous improvement in our service delivery and client experience.</li> <li>• Work with Service Delivery teams to implement changes based on participant feedback.</li> </ul>
<i>NDIS Plan Management and Compliance</i>	<ul style="list-style-type: none"> <li>• Maintain a thorough understanding of NDIS funding guidelines and plan management requirements.</li> <li>• Ensure that client NDIS plans are reviewed and updated as necessary to reflect changing needs.</li> <li>• Work collaboratively with clients and their Support Coordinators to ensure optimal plan utilisation.</li> <li>• Maintain accurate records of client NDIS plan details and funding allocations.</li> <li>• Ensure compliance with all relevant NDIS Quality and Safeguarding Framework requirements.</li> </ul>
<i>Team Leadership and Management</i>	<ul style="list-style-type: none"> <li>• Provide effective leadership, supervision, and support to the Onboarding Officers.</li> <li>• Set clear performance expectations, provide regular feedback, and conduct performance reviews.</li> <li>• Foster a collaborative and positive team environment.</li> <li>• Delegate tasks and responsibilities effectively to ensure efficient workflow.</li> <li>• Provide training and development opportunities to team members to enhance their skills and knowledge.</li> </ul>

- Monitor team performance and implement strategies to improve productivity and efficiency.
- Be a proactive and collaborative member of the Management Team.
- Lead, direct, and motivate direct reports to achieve agreed targets, celebrating organisational success.
- Refine roles and responsibilities over time to achieve better business outcomes.
- Model Westhaven's Leadership Values.
- Coach and mentor staff and encourage professional development and continuous learning.

## Knowledge, Skills, Experience and Compliance

### Knowledge

- Demonstrated commercial acumen using data and planning to drive growth.
- Knowledge of the NDIS funding framework.
- Understanding of rostering systems.

### Skills

- The ability to communicate and negotiate with influence.
- Show sensitivity and understanding in resolving acute and complex conflicts and differences.
- Strong data analysis and interpretation skills.
- Advanced leadership and stakeholder management skills.
- Use sound arguments, strong evidence and expert opinion to influence outcomes.
- Achieve effective solutions when dealing with ambiguous or conflicting positions.

### Experience

- Successful performance in a commercial role for ten-plus years.
- Demonstrated ability to lead a workforce to achieve strategic and financial goals
- A Bachelor's degree in Business, Commerce or related field is highly regarded, however, extensive experience in related fields is also sufficient.
- Experience managing lead pipelines and conversion strategies, customer satisfaction and service teams is highly regarded.
- Experience working in a large and complex organisation coordinating cross discipline teams is highly regarded.
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### Compliance

- Current valid NSW Driver's licence.
- Obtain and maintain a current paid Working with Children Check (WWCC).


- Obtain and maintain a valid National Disability Insurance Scheme Workers Check (NDISWC).
- Vaccination for Covid 19, highly regarded.

## Key Challenges

- Leading and managing in a rapidly changing environment (NDIS plans, rosters of care, rostering and business growth).
- Managing competing demands and priorities across cross discipline teams within that environment.
- Ensuring delivery of service and employees are compliant with all compliance requirements.
- Achieving financial performance in an environment of contracts of service and NDIS funding.

## NDIS Workforce Capability Framework

- The NDIS Workforce Capability Framework describes the attitudes, skills and knowledge expected of all workers funded under the NDIS. It gives clear, practical examples and establishes a shared language of 'what good looks like' for participants when they receive NDIS services and support.
- The Framework translates the NDIS Commission's principles, Practice Standards and Code of Conduct into clear and observable behaviours that service providers and workers should demonstrate when delivering services to people with disability.
- All Westhaven employees are encouraged to review the [NDIS Workforce Capability Framework](#) for a full list of capabilities and the descriptors relevant to their role.

NDIS Workforce Capability Framework		Senior Management and Leadership	
Capability Group		Capability Name and Description	
 <p><b>Create an enabling work</b></p>		<p><b>Establish and embed NDIS values in organisational culture and practice</b></p> <ul style="list-style-type: none"> <li>• Set up and communicate business values and workplace culture to promote and reinforce the principles of the NDIS, such as upholding human rights, celebrating diversity and respecting the voice of those with lived experience.</li> </ul> <p><b>Build consistent, good practice</b></p> <ul style="list-style-type: none"> <li>• Ensure organisational policies and procedures enable, support, and reinforce good practice. Establish processes to measure and adjust services to continually improve the quality and reliability of support.</li> </ul> <p><b>Establish systems to support health and manage risk</b></p> <ul style="list-style-type: none"> <li>• Design approaches to manage health and risk, consistent with the rights of people with disability to take and</li> </ul>	

## NDIS Workforce Capability Framework

## Senior Management and Leadership

### environment

learn from risks, NDIS and organisational values, and the right of workers to a safe work environment.

#### **Establish a learning culture to support workforce capability**

- Create an organisational environment that sets and meets high quality service standards, promotes life-long learning and development and supports career development for workers in disability and the wider care sector.