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|  | Human Resources Policies and Procedures |

POSITION DESCRIPTION: CLIENT SERVICES ASSOCIATE

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| SECTION ONE: POSITION TITLE, REPORTING AND STATUS |
| Position Title: Client Services Associate |
| Reports to: Client Services Manager | Location: City of London |
| Job Status: Part-Time or Full-Time | Hours of Work: 10-25 |
| Effective Date: March 2019 | Date Revised: |

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| SECTION TWO: POSITION SUMMARY |

The Client Services Associate (CSA) is responsible to provide a range of administrative and client services support in relation to meal programs, transportation and overall operations for Meals on Wheels London

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| SECTION THREE: DUTIES AND RESPONSIBILITIES |

The key responsibilities of the Client Services Associate comprise the following:

## 3.1 Resource to the Client Services Manager

 (i) report to the Client Services Manager on any applicable organizational trends or situations that could impact on the overall ability of Meals on Wheels London to carry out its programs and services; and

 (ii) prepare any background or program information as required by the Client Services Manager.

## 3.2 Compliance with Legislation, Regulations, Contractual Obligations and Organizational Policies and Procedures

 (i) ensure compliance with applicable legislation, regulations and contractual obligations related to assigned job responsibilities.

 (ii) ensure compliance with the organizational policies and procedures; and

 (iii) inform the Client Services Manager of any areas of non-compliance with legislation, regulations and/or organizational policy.

## 3.3 Risk Management

 (i) inform the Client Services Manager of situations that could create potential risk and liabilities for Meals on Wheels London; and

 (ii) implement the risk management plan of the organization, as required.

## 3.4 Client Services Planning and Priorities

 (i) determine in collaboration with the Client Services Manager the annual priorities for client services within the context of the strategic plan of the organization.

## 3.5 Client Services Functions

 (i) act as the first point of contact for telephone and in-person inquiries for clients, volunteers, drivers, vendors and public.

 (ii) work with Central Intake Process to finalize registrations, schedule rides for clients and place meal orders.

 (iii) enter data for new clients (route codes, route directions, generating meals) as directed by Client Services Coordinator and/or Client Services Manager.

 (iv) receive ride requests from active client base and accurately record client information and bookings in alayacaredatabase.

 (v) receive and communicate to scheduling the acceptance of transportation drives by volunteers.

 (vi) follow protocols for entering data into alayacare for clients and volunteers.

 (vii) follow “not home” protocol and ensure appropriate documentation, escalation and follow-up are completed.

 (viii) maintain alayacare database, reviewing and closing files as needed, working towards accuracy and best practice standards.

 (ix) inform Administrative Assistant when new client packages need to be sent out; and

 (x) communicate with standard and frozen meal clients, documenting all changes to meal plans.

## 3.6 General Administration

 (i) provide vacation coverage, as required.

 (ii) provide relief to other Client Services Associates and Administrative Assistant as required.

 (iii) enter client files into alayacare, enter volunteer information into alayacare liaising with Volunteer Coordinator; and

 (iv) provide cross training to other Client Services Associates as directed by the Client Services Manager and/or Client Services Coordinator.

## 3.7 Meals Administration

 (i) prepare and submit the daily order for standard meals within specified timelines.

 (ii) ensure follow-up is completed and recorded daily with all meal clients not home at time of delivery.

 (iii) enter clients’ frozen meal orders in preparation for time sensitive frozen order submission and print and review route sheets for accuracy.

 (iv) print and review standard meal route sheets ensuring clear and accurate information and directions.

 (v) enter all routes driven by meal delivery volunteer are entered and ensure the data balances each month; and

 (vi) record returned frozen meals, redelivered as required and update data in client files accordingly.

(vii) various depot tasks that may include depot and temperature audits, depot cleaning, supply restocking, training of depot staff.

## 3.8 Transportation Administration

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 (i) contact volunteer drivers and track on excel spread sheet any messages that have been left for or follow-up is required; and

 (ii) prepare list of clients to be contacted by office volunteer to confirm rides two (2) days in advance. If an office volunteer is not available, then the CSA would confirm the rides.

(iii) organize Van Driver schedule and prepare the van driver timesheet. Submit van driver timesheet to Manager, Finance and Human Resources on Monday mornings bi-weekly for payroll completion.

(iv) schedule routine van maintenance (i.e. oil changes, snow tires) and other maintenance requirements as they arise.

## 3.9 Special Project Administration

 (i) complete administrative and program projects as assigned by Client Services Manager

## 3.10 Information Protocols and Systems

 (i) follow established protocols to ensure that personal information of clients, caregivers, staff and volunteers is protected and safeguarded according to the policies and procedures of the organization; and

 (ii) provide oversight to ensure the overall quality and accuracy of data.

## 3.11 Health and Safety

 (i) take initiative, when required, to identify and address any health and safety issues; and

 (ii) advise the Client Services Manager of any health and safety issues that require a broader organizational response.

## 3.12 Communications

 (i) maintain regular communications with the clients, staff, volunteers and community partners.

 (ii) implement Crisis Communications Plan, as directed by the Client Services Manager; and

 (iii) attend staff meetings, as required.

## 3.13 Community Relations

 (i) act as an ambassador for Meals on Wheels London to foster a positive reputation and protect the integrity of the organization.

## 3.14 Representation of the Organization

 (i) represent Meals on Wheels London in external meetings as assigned by the Client Services Manager.

## 3.15 Professional Development

 (i) participate in a performance evaluation process conducted by the Client Services Manager and follow up on any stated actions and/or goals; and

 (ii) attend professional development opportunities recommended by the Client Services Manager to enhance overall management knowledge and/or performance.

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| SECTION FOUR: AUTHORITY |

The Client Services Manager delegates authority to the Client Services Associate to:

 (i) provide leadership and manage their responsibilities within the established organizational policies, priorities and outcomes; and

 (ii) ensure the resources of the organization are used in an effective and efficient manner.

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| SECTION FIVE: ACCOUNTABILITY |

The Client Services Associate is accountable to the Client Services Manager to:

 (i) ensure that any applicable legislation, regulations and organizational policies are not violated.

 (ii) ensure that client services are delivered effectively and efficiently.

 (iii) ensure a safe, healthy and productive work environment.

 (iv) maintain a harmonious working relationship with staff and volunteers and any applicable community partners.

 (v) provide reliable and timely information on client services, as required.

 (vi) ensure that the organization is perceived by the community in a positive manner; and

 (vii) minimize any risks and legal liabilities to the organization.

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| SECTION SIX: QUALIFICATIONS |

The **minimum** qualifications for the Client Services Associate position are as follows:

## 6.1 Education, Professional Designation or Certification Requirements

 (i) Secondary School Diploma

## 6.2 Knowledge and Skill Requirements

 (i) three (3) years health care, community services or customer services sector.

 (ii) experience in working with a non-profit organization.

 (iii) knowledge of any applicable legislation and regulations related to job responsibilities.

 (iv) excellent written and verbal communication skills.

 (v) effective and well-developed interpersonal skills.

 (vi) requisite computer literacy level to fulfill the responsibilities of the position.

 (vii) ability to work independently and as a team member to achieve outcomes and meet deadlines; and

 (viii) ability to focus on the priorities of the position.

## 6.3 Competencies and Judgment

Demonstrated competence and good judgment to:

 (i) use professional judgment daily.

 (ii) handle emergencies, crises and hostile behavior.

 (iii) maintain control in difficult and frustrating situations.

 (iv) accommodate competing demands; and

 (v) maintain confidentiality.

## 6.4 Diversity, Equity and Inclusion

1. Candidates who have experience working with a diverse range of people, and who can contribute to the climate of inclusivity at Meals on Wheels London are encouraged to identify their experiences and potential contributions in their application cover letter.
2. Meals on Wheels London invites applications from all qualified individuals. Meals on Wheels London is committed to employment equity and diversity in the workplace and welcomes application from women, members of racialized groups/visible minorities, Indigenous person, persons with disabilities, persons of any sexual orientation, and persons of any gender identity or gender expression. Accommodations are available for applicants with disabilities throughout the recruitment process

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| SECTION SEVEN: MAJOR CONTACTS |

The Client Services Associate will maintain regular contact with the following:

 (i) Client Services Manager; and

 (ii) staff and volunteers.

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| SECTION EIGHT: WORKING CONDITIONS |

The working conditions for the Client Services Associates are as follows:

 (i) work is generally performed in office and community settings.

 (ii) work hours may vary; and

 (iii) work involves regular driving assignments.

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| SECTION NINE: EMPLOYMENT CONDITIONS |

Specific employment conditions of the Client Services Associate include the following:

 (i) valid Ontario Driver’s License, insurance and reliable transportation; and

 (ii) satisfactory Police Reference Check for the Vulnerable Sector.