

POSITION DESCRIPTION

General Information:	
Position Title:	National Financial Wellbeing Facilitator
Incumbent:	
Function & Team/Program:	Operations
Location(s):	Flexible
Manager's Position Title:	National Program Manager, Saver Plus
Manager's Name:	Matt Taylor
Date Prepared:	30 June 2025
Prepared By:	Matt Taylor
Approved By:	Lesley Mackay

Primary Purpose of this Position (<i>In one sentence - why does the role exist?</i>)
To oversee the delivery of the Financial Wellbeing Workshops project which includes coordination and facilitation of between 10 and 15 in-person workshops nationally. The workshops will be developed in partnership with ANZ.

Scope:	
Direct Reports to this Position By Position Title	Indirect Reports Total Number
• Nil	• Nil
Financial Dimensions controlled by this Position (<i>Include key financial metrics such as revenue growth, income & expense budget, etc</i>)	
Direct control	Indirect control
• Nil	• Nil

Other Dimensions of this Position
e.g. Number of programs, site responsibility, geographic spread of team
Information presented at the workshops will be based on ANZ's trusted <i>MoneyMinded</i> program incorporating content on scam prevention, building digital confidence, financial hardship and other banking support services available.
This role is responsible for presenting these key components of the <i>MoneyMinded</i> program to workshop participants, liaising with key stakeholders and participants, and overseeing the broader coordination of logistics, promotion, evaluation, and reporting. National travel is required.

Setting Priorities (<i>how is work prioritised</i>)	
How often does employee prioritise their own work? Eg. Daily, weekly, monthly, annually, other	Daily, weekly, monthly & quarterly

How often does employee determine the priorities of others? Eg. Daily, weekly, monthly, annually, other	
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Key Relationships (<i>Who does the role interact with? List the titles of individuals, departments and organisations frequently interacts with</i>)	
Internal	<ul style="list-style-type: none"> National Program Manager, Saver Plus General Managers National PR & Media Advisor Communications Manager People & Culture team members Digital & Transformation team members
External	<ul style="list-style-type: none"> ANZ Social Impact team Federal Government offices Community stakeholders

Key Decision Making in this Role: (<i>What are the key decisions and recommendations made in this role?</i>)
<p>Decisions & Recommendations Expected</p> <p>Decisions and recommendations will be made in accordance with the Financial Wellbeing Workshops project plan, including but not limited to</p> <ul style="list-style-type: none"> Stakeholder engagement and promotion Facilitation of <i>Financial Wellbeing Workshops</i> to the community nationally Administration requirements

Every Team Member at The Smith Family:

- Is expected to uphold The Smith Family Values and Culture.
- Understands and complies with the Child Protection Framework.
- Takes reasonable care for the health and safety of themselves and others.
- Understands and complies with the Workplace, Health and Safety Systems.
- Reports hazards and incidents and participates in risk management as required.

Key Responsibilities / Accountabilities:		
Major Area:	Workshop Facilitation (Primary Focus)	% of Job Total: 30%
Facilitate <i>Financial Wellbeing Workshops</i> to the community nationally, using approved MoneyMinded content and provided materials.		
Adapt delivery style for a range of community audiences, including vulnerable individuals, whilst creating a welcoming, inclusive, and practical learning environment for all participants.		
Present on topics including scam prevention, building digital confidence, financial hardship and other banking support services available.		
Respond to participant questions with empathy and professionalism and provide follow-up resources where appropriate.		
Major Area:	Project Management (Primary Focus)	% of Job Total: 30%
Plan and deliver a minimum of 10 and maximum of 15 in-person workshops, ensuring a successful pilot in September 2025		
Coordinate venue bookings and catering (if held at The Smith Family offices), travel, and event logistics in collaboration with internal and external stakeholders.		
Liaise with partners on branding, approvals, and co-hosting of events.		
Major Area:	Stakeholder Engagement & Promotion	% of Job Total: 25%

Collaborate and engage with ANZ, MPs, local networks, and The Smith Family's community partners to promote workshops and recruit participants.		
Work with The Smith Family's communications and marketing teams to co-develop and share promotional materials.		
Support the involvement of partners representatives, including senior executives, in selected events.		
Major Area:	Evaluation, Reporting and Compliance	% of Job Total: 15%
Manage registration, attendance tracking, and participant feedback collection.		
Administer surveys at the end of each workshop.		
Provide regular updates to ANZ on participant numbers and insights.		
Coordinate with reporting manager to support end-of-project financial acquittal and ensure compliance with partnership requirements.		
Assist with the development of case studies and content for communications.		
Key Challenges in Achieving Goal(s): (What are the key challenges faced by this role in meeting goals/objectives)		
<ul style="list-style-type: none"> • Liaise with multiple stakeholders, participants, key community and government stakeholders • Management and coordination of interstate events • Regular interstate travel 		
Qualifications, Experience and Competencies: (What background, knowledge, experience or competencies are required to perform the role at the expected level?)		
Education / Qualifications / Memberships:	Essential	Desirable
	<ul style="list-style-type: none"> • MoneyMinded Coach accreditation (can be provided) 	<ul style="list-style-type: none"> • Certificate IV in Training and Assessment, or Mental Health First Aid / Trauma-Informed Practice, or Cultural Competency Training or equivalent • Relevant Tertiary qualification or equivalent experience • Financial Counselling Qualification (e.g., Diploma of Financial Counselling - CHC51122 or equivalent)
Experience:	Essential	Desirable
	<ul style="list-style-type: none"> • Demonstrated experience facilitating workshops or training, ideally in financial capability, or wellbeing. • Proven stakeholder engagement skills - demonstrated ability to build and maintain strong relationships with a wide range of stakeholders, including community partners, service providers, and internal teams. • Demonstrated knowledge on financial literacy: Adept understanding of personal finance concepts and ability to translate complex information into easy-to-understand content. 	<ul style="list-style-type: none"> • Accreditation or experience with the MoneyMinded program (training will be provided if needed). • Confidence using basic survey tools or CRM systems. • Knowledge of referral pathways to financial counselling, legal aid, and other support services.

	<ul style="list-style-type: none"> • Experience with adult learning principles and interactive facilitation techniques. • Strong interpersonal and communication skills, with the ability to engage diverse audiences with sensitivity and respect. • Excellent organisational and time management skills – able to coordinate travel, venues, and event logistics. • Proficiency in Microsoft Office (Word, Excel, Outlook) and data reporting tools. • Adept in project management methodology, tools and frameworks • Ability to track progress, manage budgets if required, and report on outcomes. 	
Competencies:	Essential	Desirable
	<ul style="list-style-type: none"> • Experience working collaboratively with stakeholders such as corporates, government representatives, and community organisations. • Demonstrated understanding of issues facing people experiencing disadvantage, including financial stress and abuse. • Ability to undertake regular interstate travel (up to fortnightly) • Problem solving & adaptability: Ability to respond to diverse needs and unexpected challenges during workshop delivery or project coordination, displaying a “can do” attitude • Ability to demonstrate high level of influential skills • Outstanding Facilitation & Presentation Skills: Ability to engage groups, manage dynamics, and facilitate interactive learning. • A commitment to delivering services that are respectful and accessible to all Australians. 	<ul style="list-style-type: none"> • Knowledge of scam prevention and digital financial safety strategies. • Experience in co-branded partnership delivery and reporting.