

POSITION DESCRIPTION

General Information:	
Position Title:	Financial Wellbeing Facilitator
Incumbent:	
Function & Team/Program:	Financial Wellbeing Team – Saver Plus – Community Programs & Delivery
Location(s):	Flexible
Manager's Position Title:	National Financial Wellbeing Facilitator
Manager's Name:	Lisa Gissing
Date Prepared:	22 nd July 2026
Prepared By:	Matt Taylor
Approved By:	Lesley Mackay

Primary Purpose of this Position (<i>In one sentence - why does the role exist?</i>)
The Financial Wellbeing Facilitator supports the delivery and growth of community financial capability initiatives by promoting, coordinating and facilitating online and in-person Scam Awareness Workshops in partnership with ANZ. Working under the guidance of the National Financial Wellbeing Facilitator, the role delivers approved MoneyMinded content to empower diverse and vulnerable community participants with practical digital and financial literacy skills to help them protect themselves from scams. Additionally, the position drives participant engagement, local and national stakeholder relationships, and post-workshop evaluation to ensure continuous program quality and alignment with partnership objectives.

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 support services available.	

- This role is responsible for presenting these key topics from the *MoneyMinded* program to workshop participants, liaising with key stakeholders and participants, and overseeing the broader coordination of promotion, logistics, evaluation, and reporting.
- The position operates nationally across virtual and face-to-face environments, requiring strong adaptability to engage diverse participant cohorts and local community networks. National travel is required.
- It maintains close operational alignment with internal communications, digital teams, and external partner contacts to achieve target attendance numbers and workshop delivery milestones.

Setting Priorities (how is work prioritised)	
How often does employee prioritise their own work? Eg. Daily, weekly, monthly, annually, other	Daily, weekly, monthly, quarterly & yearly
How often does employee determine the priorities of others? Eg. Daily, weekly, monthly, annually, other	Not Applicable

Key Relationships (Who does the role interact with? List the titles of individuals, departments and organisations frequently interacts with)	
Internal	• National Program Manager, Saver Plus • National Financial Wellbeing Facilitator • National PR & Media Advisor • Communications Manager • People & Culture team members • Digital & Transformation team members
External	• ANZ Social Impact and Community Partnerships team • Community stakeholders • Local ANZ Branch staff including District Managers and Branch Managers • ANZ media team

Key Decision Making in this Role: (What are the key decisions and recommendations made in this role?)
Decisions & Recommendations Expected Decisions and recommendations will be made in accordance with the Scam Awareness Workshops project plan, including but not limited to: • Promotion of Scam Awareness Workshops • Stakeholder engagement • Management of ANZ referral pathway • Facilitation of <i>Scam Awareness Workshops</i> to the community nationally • Administration requirements • Evaluating and reporting on workshops

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	% of Job Total: 10%

Plan and deliver a minimum of 20 online and 5 in-person Scam Awareness Workshops annually using approved MoneyMinded content and provided materials to achieve established community outreach targets.		
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 interactive sessions on topics including scam prevention, building digital confidence, financial hardship and other support services available to increase participant financial literacy and confidence.		
Respond to participant questions with empathy and professionalism and provide follow-up resources where appropriate to support positive participant pathways.		
Major Area:	Project Management	% of Job Total: 35%
Manage registrations, referrals and attendance tracking including responding to enquiries, and sending workshop reminders and follow ups, to ensure accurate data capture and attendance goal achievement.		
Coordinate venue bookings and catering, travel, and workshop logistics in collaboration with internal and external stakeholders to guarantee smooth operational execution.		
Liaise with internal & external partners on workshop branding, approvals, and co-hosting logistics of workshops to maintain consistent quality and partnership compliance.		
Major Area:	Stakeholder Engagement & Promotion	% of Job Total: 40%
Manage secure referrals from ANZ and adapt communication as appropriate.		
Collaborate and engage with ANZ, local networks, community organisations, industry stakeholders and The Smith Family's community partners to promote workshops to recruit participants, and secure target participant registrations.		
Work with The Smith Family's communications and marketing teams to co-develop and distribute promotional collateral for optimal audience reach.		
Support the involvement of key partners representatives, including senior executives, in selected workshops to enhance partner relations and visibility.		
Major Area:	Evaluation, Reporting and Compliance	% of Job Total: 15%
Administer post-workshop evaluation surveys at the end of each workshop and report and analyse feedback to measure program impact and inform continuous improvements.		
Provide regular updates to ANZ on participant numbers and insights		
Assist the National Financial Wellbeing Facilitator to coordinate end-of-year financial acquittal and ensure compliance with partnership requirements.		
Assist with the development of participants case studies and content impact stories to support wider organisational communications.		
Key Challenges in Achieving Goal(s): (What are the key challenges faced by this role in meeting goals/objectives)		
• Liaise with multiple stakeholders, participants, key community, industry and government stakeholders • Management and coordination of interstate and online workshops • Target achievements, registration to attendance rate • 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
	• MoneyMinded Coach accreditation (can be provided)	• Certificate IV in Training and Assessment, Mental Health First Aid / Trauma-Informed Practice, or

		Cultural Competency Training or equivalent • Relevant Tertiary qualification or equivalent experience • Financial Literacy Education Skill set CHCSS00077 or equivalent • Financial Counselling Qualification (e.g., Diploma of Financial Counselling - CHC51122 or equivalent)
Experience:	Essential	Desirable
	• Demonstrated experience facilitating online and in person 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. • Demonstrated experience in promoting community programs to the public • 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 Teams and Microsoft Office (Word, Excel, Outlook, MS Forms) and data reporting tools. • Confidence using survey tools or CRM systems • Adept in project management methodology, tools and frameworks	• Accreditation or experience with the MoneyMinded program (training will be provided if needed). • Knowledge of referral pathways to financial counselling, legal aid, and other support services.

	• Ability to track progress, manage budgets if required, and report on outcomes.	
Competencies:	Essential	Desirable
	• Experience working collaboratively with stakeholders such as corporates, government representatives, and community organisations. • Experience with online delivery using Microsoft Teams • Demonstrated understanding of issues facing people experiencing disadvantage, including financial stress and abuse. • Ability to undertake regular interstate travel • 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 strong interpersonal and stakeholder engagement skills • Ability to demonstrate high level of influential skills • Outstanding online and in person 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.	• Knowledge of scam prevention and digital financial safety strategies. • Experience in co-branded partnership delivery and reporting.