

## Project Lead

Start Date: 25/01/2021

End Date: not applicable

Contract Type: Full-time

Location: Auckland

## About the Commission for Financial Capability

The Commission for Financial Capability (CFFC) is the office of the Retirement Commissioner. The CFFC aims to help New Zealanders to retire with confidence. Retiring with confidence means New Zealanders feel secure that they'll have resources to live and the know-how to make ends meet.

We focus on three areas; Retirement Policies, Retirement Villages and Financial Capability. As part of our role we advise Government on the policies that will enhance retirement outcomes for New Zealanders. We also help support individuals to better prepare for retirement, and we contribute to better understanding of what retirement means in the 21<sup>st</sup> century. Times are changing.

### Tā Mātou Whakakitenga/Our Vision

New Zealanders retire with confidence

### Tā Mātou Kaupapa Mātāmua/Our Mission

To help improve retirement outcomes for New Zealanders, with **trusted information**, **informed advocacy** and **effective collaboration**

## Position purpose

The Project Lead is responsible for leading and managing a significant financial capability project to equip 1,200 Pacific households with the skills and competencies to cope with economic shocks and save for home ownership. The project has been funded \$2.64m over four years by the Ministry for Pacific Peoples.

## Key aspects of the role include

- Project management including project documentation and reporting
- Relationship management with internal and external stakeholders
- Procurement and supplier management
- Supporting the product development of learning and training materials
- Supporting training the trainers/providers
- Development and management of a quality assurance framework
- Development and execution of an evaluation programme to determine impact
- Financial management of the project.

## Working Relationships

<b>Reports to:</b>	Director, Financial Capability
<b>Member of:</b>	Financial Capability
<b>Direct reports:</b>	Nil
<b>External Relationships:</b>	Ministry for Pacific Peoples, providers, facilitators, trainers and learners.
<b>Internal Relationships:</b>	Works closely with Learning Development, Learning Delivery, Marketing, Communications and Corporate Services teams

## Responsibilities and Accountabilities

<b>Lead</b>	
<b>Navigating for the Future</b>	
<b>Leading with influence</b>	Lead and communicate in a clear, persuasive, and impactful way; to convince others to embrace change and take action.
<b>Engaging Others</b>	Connect with and inspire others
<b>Engaging with stakeholders</b>	Focus on positive relationships and building consensus - whether working with industry, government agencies, community groups, or NGOs.
<b>Stewardship – of people, functions, organisation and systems</b>	
<b>Enhancing organisational performance</b>	Drive innovation and continuous improvement within remit
<b>Enhancing system performance</b>	Work to identify and implement improvements to systems and processes used
<b>Making it happen</b>	
<b>Managing work priorities</b>	Plan, prioritise, and organise work to deliver on short and long-term objectives
<b>Flexibility</b>	Take a creative approach; work cheerfully within and across teams to tackle different activities to improve outputs and help other team members

## Specific Position Responsibilities

Pillar	Responsibilities
<b>Trusted Information</b>	<ul style="list-style-type: none"> <li>• Develop and maintain project management tools and artefacts ensuring the project is achieving mutually agreed objectives and goals</li> <li>• Develop, maintain and continuously improve project reporting ensuring the programme of work is delivered on time, within scope and within budget.</li> <li>• Develop and maintain annual budgets, forecasts and business plans</li> <li>• Support the Learning Development team and CFFC Facilitators to develop learning and facilitation material to achieve required learning outcomes, capture post course evaluation feedback and continuously improve learning and facilitation material</li> <li>• Ensure all learning and facilitation material meets CFFC and Ministry for Pacific Peoples brand guidelines</li> <li>• Support the CFFC Facilitators to train the trainers to deliver the programme to 1,200 Pacific households</li> <li>• Ensure sufficient trainers are available to deliver the project outcomes and goals</li> <li>• Develop and execute a quality assurance framework ensuring quality training and learning outcomes are always delivered</li> <li>• Develop and execute a robust reporting system for trainers and providers to report on project outcomes</li> <li>• Support an independent evaluator to develop data collection tools and an evaluation programme to monitor and continuously improve project impact and outcomes</li> </ul>
<b>Informed Advocacy</b>	<ul style="list-style-type: none"> <li>• Effectively advocate for the need for trusted, independent financial capability information and education for Pacific peoples</li> </ul>
<b>Effective Collaboration (external)</b>	<ul style="list-style-type: none"> <li>• Build effective relationships with external and internal stakeholders vital to the success of the project.</li> <li>• Lead regular progress meetings between the Ministry for Pacific Peoples and CFFC.</li> </ul>
<b>Effective Collaboration (internal)</b>	<ul style="list-style-type: none"> <li>• Demonstrate a commitment to and respect for the Treaty of Waitangi and incorporate this into every aspect of work</li> <li>• Acknowledges other team members' skills, experience, knowledge, creativity, and contributions</li> <li>• Facilitates open communication and listens to feedback and input from other team members</li> <li>• Works cooperatively within team and across functions to deliver CFFC outcomes and joint projects</li> <li>• Communicates respectfully and constructively to all team members</li> <li>• Actively participates in team and organisation wide meetings and events</li> <li>• Identifies improvement opportunities and collaboratively develops and implements solutions, seeking others' ideas and suggestions</li> <li>• Willing to openly share information and help team members in need</li> </ul>

	<ul style="list-style-type: none"> <li>Understands diversity - cultural differences, gender, multiple viewpoints, special interest groups and age differences</li> </ul>
<b>Other</b>	<ul style="list-style-type: none"> <li>Complete a robust Request for Proposal (RFP) process to identify suitable providers to deliver financial education to 1,200 Pacific households across multiple locations in Aotearoa.</li> <li>Comply with all Government Procurement Rules for sourcing suppliers and ongoing contract management.</li> <li>Manage and monitor the performance of providers ensuring the project is tracking towards the minimum target outcomes</li> </ul>
<b>Safety, Health and Wellbeing (all positions)</b>	<ul style="list-style-type: none"> <li>Take reasonable care of own health and safety and ensure that actions don't cause harm to yourself or others</li> <li>Comply with any reasonable instructions, policies or procedures on how to work in a safe and healthy way</li> <li>Rectifying minor health and safety issues where authorised and safe to do so</li> <li>Reporting any hazards including unsafe conditions, equipment or practices, as soon as practicable</li> <li>Ensure not under the influence of alcohol, drugs or medication which affects your ability to perform duties safely or efficiently</li> <li>Report any incidents or injuries sustained while working and seeking appropriate first aid</li> <li>Ensuring all health and safety equipment is used correctly</li> </ul>

## Essential skills and experience

### Leadership:

- Honest and Courageous – Ability to have courageous and honest conversations for the best interests of CFFC, its people and the New Zealand public
- Self-aware and agile – Ability to leverage self-awareness to improve skills and adapt approach to strengthen personal capability over time and optimise effectiveness with different situations and people.
- Team player – General attitude and conduct reflects a supportive, collaborative and constructive approach
- Resilient - Show composure, grit, and a sense of perspective when the going gets tough to help others maintain optimism and focus
- Curious - Show curiosity, flexibility, and openness in analysing and integrating ideas, information, and differing perspectives to make fit-for-purpose decisions
- Communication – communicates clearly, professionally and constructively both verbally and in writing; letters and reports and submissions are accurate and well structured
- Ability to Deliver - Works well under pressure, can prioritise and manage workload, meets expected deadlines, carries out instructions completely and accurately, uses knowledge and experience to inform decisions, demonstrates technical skills to deliver role expectations and takes appropriate action without being prompted

**Position Specific:**

- Minimum of 7 years relevant experience in project managing and leading a similar scale education project.
- A relevant project management qualification and/or demonstrated work experience.
- Demonstrated leadership and management experience on scale with the deliverables required for this project.
- A thorough insight into Pacific peoples culture, language and identity, particularly insight around how to be culturally respectful.
- A commitment to grappling with complex socio-economic issues and experience in making a difference for Pacific people.
- Highly effective at creating new partnerships and relationships internally and externally.
- Strong strategic capabilities while also being able to manage and implement the day to day deliverables of a long-term plan.
- Strong analytical skills to manage a significant budget and build measurements of success.
- A proven can-do attitude and is a self-starter requiring little supervision (but seeks guidance when required)
- Demonstrated experience in problem solving.
- Well versed in meeting with and presenting to groups and individuals
- Excellent attention to detail across multiple workstreams.
- The ability to apply knowledge in a practical, commercial manner.
- Willingness to assist and support others as required and get on with team members

## Acknowledgement

This position description serves to illustrate the scope and responsibilities of the position and is not intended to be an exhaustive list of all tasks and duties. You will be required to perform other job-related tasks as requested and as necessitated by the development of this role and the organisation. This position description may also be modified and updated from time to time to reflect these changes.

I certify that I have read, understood and accept the duties, responsibilities and obligations of my position.

\_\_\_\_\_  
Employee

\_\_\_\_\_  
Date

\_\_\_\_\_  
Manager

\_\_\_\_\_  
Date