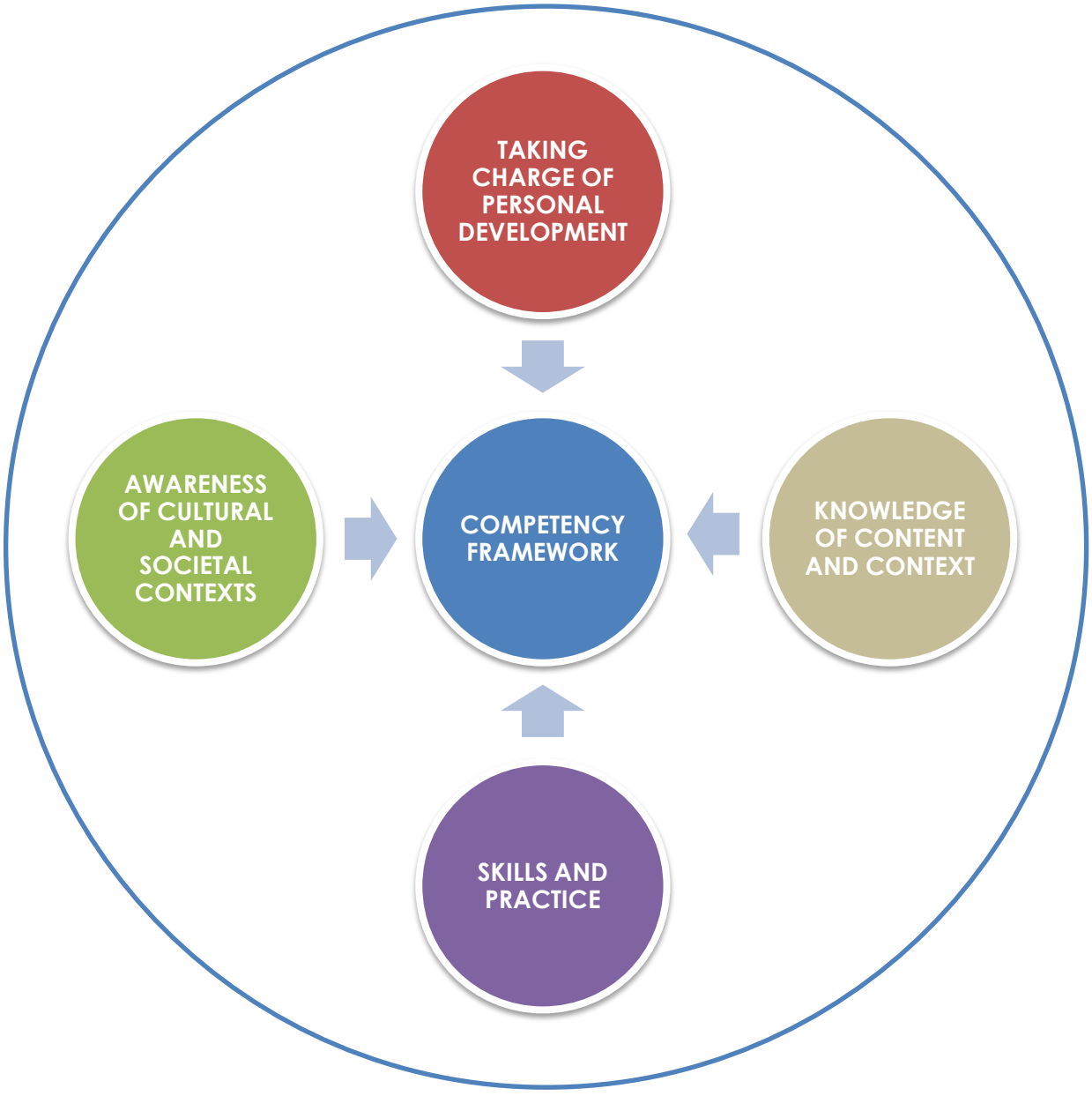
Professionalising the Sector - Facilitator Competency Framework



TAKING CHARGE OF PERSONAL DEVELOPMENT

COMPETENCY	COMMUNITY	PROFESSIONAL
Awareness of own strengths and limitations	• Carries out regular self-evaluation of personal strengths and limitations • Seeks and uses feedback to improve self, especially as a community enabler	• Seeks out, and uses, feedback to evaluate and improve self as a facilitator of personal financial management
Well-developed sense of self-worth and self-belief	• Functions in a confident manner in all dealings with the whanau, community groups and individuals	• Shows confidence and is aware of personal strengths • Has thorough knowledge of the content and is able to project confidence in delivery style
Awareness of own emotions, biases and attitudes towards own performance and others	• Is balanced and calm when challenged	• Is balanced and calm when challenged • Shows awareness and has empathy with people's anxiety regarding money matters • Has knowledge of where to refer those who need professional help
Sets goals and improves own performance	• Able to set goals and takes steps to improve performance and outcomes	• Explores new ways to get better results • Takes steps to learn about what is required to improve own practice • Has an on-going self-improvement plan in place
Open to new thinking and behaviours	• Operates in an open and positive way • Open and adaptive to new ideas • Prepared to learn from others	• Operates in an open and positive way • Open and adaptive to new ideas for facilitation and improving participants' performance

AWARENESS OF CULTURAL AND SOCIETAL CONTEXTS

COMPETENCY	COMMUNITY	PROFESSIONAL
Understands and is able to respond to cultural diversity and different contexts	• Sensitive to cultural norms of the target group/s and responds appropriately to the needs of the group members • Aware of, and responds to, formal and informal dynamics of the group	• Operates in accordance with the cultural norms of the target group/s and social contexts • Able to manage formal and informal group dynamics in a culturally appropriate manner
Able to sense the feelings and concerns of others	• Demonstrates genuine interest in individual group members • Allows time and space for self-expression/views	• Creates a safe environment for group members to share their views and feelings
Able to adapt to changing situations and circumstances	• Responsive to changing situations and circumstances within the group • Able to adjust delivery to suit the group	• Manages changing situations and circumstances effectively • Adjusts session content and delivery style to meet the needs of the group members
Ability to communicate in audience's context	• Is able to give examples in the context of audience (know the nuances)	• Is able to name appropriate financial products to assist cultural understanding • Is aware of the financial possibilities in the local financial market

SKILLS AND PRACTICE

COMPETENCY	COMMUNITY	PROFESSIONAL
Ability to help others to increase their capabilities and reach their potential	• Non-judgemental, and positive • Seeks solutions from, and for, the community	• Non-judgemental and positive • Assists participants to develop capabilities and solutions
Able to work collaboratively with others	• Negotiates and 'contracts' a fair distribution of effort with, and between, the community group	• Negotiates and 'contracts' a fair distribution of effort with and between facilitators and session participants
Able to engage in dialogue and use other skills to help individuals and groups to improve their own learning	• Uses enquiry strategies to encourage and support questions and discussion	• Extensive use of enquiry strategies to encourage and support questions and discussion
Ability to deliver using a 'strengths based' model while focussing on solutions	• Has a welcoming and supportive tone and uses cues to encourage • Values the experience, contribution and expertise of the group members	• Encourages and solicits group member contribution • Values individual contribution
Able to manage group processes	• Sets the tone, articulates aims, objectives and protocols to be followed by group members	• Articulates the session aims, objectives and protocols clearly • Sets the standards for group interaction and individual contribution
Able to design programmes, sessions or events to create an environment to encourage sustainable changes in	• Uses facilitation techniques, tools and strategies in a community setting	• Employs tools, techniques and content appropriate to the target group
Models appropriate personal financial management behaviours	• Has adopted, or applied, some personal financial management skills into their own life, and is able to share these with the group	• Has applied, or is currently applying, a variety of personal financial management skills in their own life • Is able to share appropriate insights into challenges and opportunities/benefits of managing personal finances

KNOWLEDGE OF CONTENT AND CONTEXT

COMPETENCY	COMMUNITY	PROFESSIONAL
Understands personal financial management concepts and has experience in implementing these concepts	• Displays general awareness of personal financial management concepts and some potential impacts • Is able to relate, and apply, personal financial management concepts to their personal experiences.	• Extensive personal experience, and wide knowledge of others who have applied personal financial management concepts to their lives • Knowledgeable about personal financial management concepts and the impacts of applying, or failing to apply, those concepts
Broad understanding of the wider financial world	• Has general knowledge of the wider financial world	• Able to relate to, and explain, individual circumstances in the context of the wider financial world and current affairs
Up to date with the sources of information about personal financial management facilitation skills	• Able to differentiate between an intervention and an education role • Understands the difference between facilitation and presentation • Able to refer participants to where further help can be found	• Knowledgeable about where information and help regarding personal financial management can be found • Knows where information about how to facilitate personal financial management can be found • Keeps up to date with the developments in the content of personal financial management

References

In preparing this framework we have used the following

- Feedback from the Facilitator hui held in AKL on 01 July 2015
- Financial Literacy Competency Framework (for adults)
- *Facilitation Competency Framework* document; National College for Teaching and Leadership. (2015)
- Feedback from the academic team of the Westpac Massey Fin-Ed Centre
- Facilitator training evaluations being carried out over the past 18 months and other relevant documents