



2026 INNOVATION ROUND GRANTEES

Client Engagement System for Attendance, Follow-up and Evaluation

Organisation: Anglicare NSW South, NSW West & ACT

Grant amount: \$77,000

Anglicare will pilot a client engagement system that brings booking, reminders, follow-up, safety and welfare communication, and feedback evaluation into one streamlined workflow across all stages of financial counselling. Integrating with Outlook, it enables controlled booking, automated reminders, and consistent follow-up to improve booking access, attendance, and post-referral utilisation.

Digital Intake and Triage for Financial Counselling

Organisation: Anglicare WA

Grant amount: \$77,000

Anglicare WA will develop, trial and integrate a digital intake and triage decision tree model within our existing Financial Wellbeing HUB. It will support safe self-enrolment, clearer client journeys through complexity grading, improving intake efficiency, financial counsellor workload management and enhanced client outcomes across financial counselling services.

Client Document Upload Pilot

Organisation: Child and Family Services Ballarat

Grant amount: \$70,600

Cafs will trial a secure client document upload portal enabling clients to submit documents and complete actions between appointments. By shifting administrative tasks outside sessions, the project will reduce workload, increase practitioner capacity, and enable timelier access to financial counselling for people experiencing financial hardship.

Designing VERA: Verified Evidence and Records Access

Organisation: EACH

Grant amount: \$76,930

Each will scope and design the consent and legal frameworks, user workflows, and regulatory and technical considerations for a Verified Evidence and Records Access Platform (VERA). VERA will provide Financial Counsellors with timely and comprehensive access to client-consented records from government corporate registers, significantly improving administrative efficiency and counselling capacity.

Client Management System Transition Pilot

Organisation: Financial Counselling Victoria

Grant amount: \$76,981

FCVic will pilot a structured transition process for financial counselling agencies upgrading Client Management Systems. The project will test migration tools, data standards and implementation supports to reduce administrative burden, improve data quality and enable more efficient service delivery, informed by sector-wide digital transformation insights.

2026 Innovation Round Grantees

Integrated Case Notes Pilot

Organisation: Financial Rights Legal Centre

Grant amount: \$68,670

Scope, pilot and evaluate an AI enabled integration between telephone and CRM systems to automate case notes and summaries from voice-to-text for the National Debt Helpline, while developing transferable privacy, ethical and technical standards and policy templates for adoption across the financial counselling sector.

Improving Client Retention and Efficiency Through Lived Experience

Organisation: Good Shepherd Australia New Zealand

Grant amount: \$74,636

This project will improve financial counselling efficiency and outcomes by reducing early client disengagement. It will embed lived experience insights for approaches to increase client retention and case completion, producing a real-world based, fit for purpose sector wide practice guide to support consistent adoption, scale and measurable service effectiveness.

Anangu-led Stepped Financial Counselling System

Organisation: Money Mob Talkabout

Grant amount: \$77,000

MoneyMob will prototype an Anangu-led stepped financial counselling system that introduces structured triage and workflow pathways to match clients to the right level of support earlier. The model will reduce unnecessary demand for intensive casework, improve service efficiency, and create a scalable service architecture for the financial counselling sector.

Digital Financial Counselling Access Booths

Organisation: Northern Rivers Community Gateway

Grant amount: \$77,000

Community Gateway will pilot three digital financial counselling access booths in community health settings across Clarence Valley, Tweed Shire and Richmond Valley. Booths provide secure, private spaces for clients to connect with financial counsellors via video, reducing travel time, increasing financial counsellor capacity and creating a scalable regional delivery model.

Condensed FDSV Risk Screening Tool

Organisation: Women's Legal Service WA

Grant amount: \$77,000

Women's Legal Service WA (WLSWA) will develop a concise, trauma-informed FDSV screening tool tailored for financial counsellors. Designed for time-poor, non-specialist services, the tool will enable safe disclosure, assess perpetrator risk, support appropriate referrals to specialist services, and integrate financial counselling practice within professional and legal limitations.