



Job Title: Financial Wellness Facilitator

Reports to: Chief Impact Officer

Classification: Full time, Hourly, Non-Exempt

Work Schedule: 30 hours per week, with the opportunity to become full-time at 37.5 hours per week (medical and dental benefits available).

Pay Rate: \$24/hour - \$26/hour

Introduction: United Way of Greater New Bedford (UWGNB) has been a cornerstone of the SouthCoast since 1953, mobilizing people, partnerships, and resources to catalyze meaningful change. Through strategic collaboration, direct services, and financial investments, we identify community needs and create innovative initiatives to address them. As our community evolves, so do we—continuously rising to meet new challenges, needs and opportunities.

In 2023, UWGNB boldly launched financial literacy programming to empower individuals to manage their finances. Now, as we expand this vital work, we're seeking a passionate and dynamic Financial Wellness Facilitator to join our team! Are you driven by the desire to help others achieve financial independence and overcome life's obstacles? Do you thrive at the intersection of community engagement, program facilitation, and measurable impact? If so, this role is for YOU!

Summary

As a **Financial Wellness Facilitator**, you'll play a pivotal role in United Way's financial security initiatives, splitting your time between two critical programs:

1) Financial Wellness at Work

The Financial Wellness Facilitator serves as United Way's on-site contact at participating workplaces, helping employees address non-work-related challenges. By leveraging their deep knowledge of community resources, the Facilitator raises awareness, connects employees to services, and provides referrals to remove barriers that impact attendance and productivity.

2) Financial Wellness for Women

The Financial Wellness Facilitator manages the 10-week program that helps women transform their lives through essential money management skills. They lead introductory workshops and work closely with participants and volunteer coaches to ensure successful collaboration and progress toward participants' goals.

Financial Wellness at Work: Essential Duties and Responsibilities

Travel weekly to assigned workplaces on a consistent schedule, providing employees with one-on-one guidance and assistance navigating the local social service network.

- Schedule appointments and maintain "office hours" on-site and in the community to meet with employees who ask for help with non-work related issues
- Listen and ask questions to identify employee's needs
- Empower the employee by working with them to develop a plan with multiple options to overcome the non-work related issue. Options may include ideas within that employee's



- existing personal support network (family/friends) or referrals to available public assistance and private provider options within the local social service network
- Provide applications and forms for available programs and assist employees with paperwork
- Serve as the liaison to the participating financial institution for small-dollar loans
- Follows-up with employee to assess success or continued need
- Promote available community resources and financial literacy programming opportunities inside each company (ex. break rooms, staffing bulletin boards, company newsletters, Lunch & Learn programs, health fairs, company meetings, etc.)
- Works with employers at participating workplaces to help identify employees in need

Financial Wellness for Women: Essential Duties and Responsibilities

Responsible for overseeing the program including conducting the introductory workshop, overseeing coach/ participant success, and program evaluation.

- Attend and oversee workshops
- Lead the facilitation of the introductory workshops for both the coaches and participants as well as gather feedback from both groups
- Assist in recruitment of volunteer coaches
- Assist in matching coaches and participants
- Step in as the backup coach as necessary
- Weekly communications with participants and coaches and handling of issues and questions as they arise

Other duties and responsibilities:

- Participate in staff meetings and other committees as assigned
- Establish key performance metrics and generate reports using key indicators
- Maintain data and report program results quarterly
- Identify trends and track utilization
- Provide suggestions to improve the program

Duties, responsibilities, and activities may be added or deleted based on business need.

Education & Experience

- Bachelor's degree
- Three to five years' experience in financial literacy or project management
- Bi-lingual, Spanish preferred

Skills Required

- Strong presentation, public speaking and facilitation skills
- Self-directed and flexible work style with limited supervision
- Strong organizational and program management skills
- Able to build rapport with a variety of constituents
- Creative thinking and problem-solving skills; resourceful
- Positive, non-judgmental attitude and good listening skills; easy to talk to
- Ability to work with and be sensitive to people from diverse backgrounds



- Strong computer skills and data tracking capabilities
- Ability to comply with policies and procedures at various locations, as well as federal and state confidentiality laws

Reliable transportation required. Hours between 8:30 am – 5 pm with some evenings and weekends.

Candidates should email resume and cover letter to:

liveunited@unitedwayofgnb.org

Please list subject as *Financial Wellness Facilitator*

Review of applications will begin immediately and continue until position is filled.

United Way of Greater New Bedford is an equal opportunity employer. We do not discriminate on the basis on race, religion, color, national origin, sex, gender identity, sexual orientation, age, veteran status, medical condition, status as an individual with a disability, or any other basis applicable by law. United Way of Greater New Bedford strives to foster an inclusive and empowering environment for all employees.