



United Way  
of Greater New Bedford

128 Union Street, Suite 105 · New Bedford, MA 02740 · Tel: 508-994-9625 · Fax: 508-994-9667

Mobilizing people, partnerships, and resources to catalyze change that strengthens the communities we serve.

**Job Title:** Financial Wellness Coordinator

**Reports to:** Financial Wellness at Work Director

**Classification:** *Full-time, non-exempt*

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United Way of Greater New Bedford (UWGNB) fights for the health, education and financial stability of every person in the nine communities it serves. Through strategic collaboration, direct services and financial support, we actively engage with our communities to identify gaps and create initiatives to address them. Every United Way of Greater New Bedford staff member serves as an ambassador for the organization, demonstrating a culture of fundraising and volunteer engagement.

### **Summary**

The Financial Wellness Coordinator serves as an on-site United Way contact at participating workplaces to assist employees in resolving non-work related issues. The Financial Wellness Coordinator uses his/her extensive knowledge of community resources to create awareness and to assist employees in connecting to available services. The Resource Coordinator empowers employees with information and referral services with a goal to eliminate barriers that interfere with an employee's ability to maintain good attendance and/or be fully productive at work.

The Resource Coordinator will direct any requests or issues related specifically to the job, working conditions, company policies, benefits, and leave plans to the company.

### **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
- Make inquiries to agencies and service providers alongside an employee when appropriate
- Serve as the liaison to the participating financial institution for small-dollar loans
- Follows-up with employee to access 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 employer at participating workplaces to help identify employees in need



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#### **Demonstrate working knowledge of supportive services and other resources**

- Establish ties and maintain positive relationships with United Way of Greater New Bedford Family Resource Center, and other service providers and agencies in the community
- Maintain updated resource list for referral information
- Attend meetings / trainings of local service providers
- Some nights and weekends required

#### **Maintain data and report program results**

- Participate in staff meetings and other committees as assigned
- Establish key performance metrics and generate reports using key indicators
- Create and maintain computer database of client files by recording each contact made with employees and maintain records required for follow-up
- Produce quarterly reports to be presented to participating workplaces and United Way Board of Directors
- 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 skills
- Self-directed and flexible work style with limited supervision
- Strong organizational and program management skills
- Able to build rapport with company leaders and HR managers
- Able to build rapport with employees, trustworthy
- 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 employer locations, as well as federal and state confidentiality laws

Reliable transportation required

Candidates should email resume and cover letter to: [liveunited@unitedwayofgnb.org](mailto:liveunited@unitedwayofgnb.org) and list in the subject line **Financial Wellness Coordinator**.

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



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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.