



United Way
of Washtenaw County

United Way of Washtenaw County Position Description- Financial Coach

Who We Are:

For more than 40 years, United Way of Washtenaw County has been the most effective and efficient way to make a difference here at home. Annually, we raise and invest donor contributions in carefully selected nonprofit programs, manage our own initiatives to promote financial stability and volunteerism, and forge community partnerships that advance [our mission](#) of connecting people, resources and organizations together to create a thriving community for everyone.

In 2017, we made [equity](#) a central focus of our work that must find full expression in our organizational culture, values, norms, and behaviors and those of our partners. We recognize that the strength and vitality of an entire community is tied to just and equitable access to resources and opportunities.

In all our roles we will consciously work to eliminate injustice and inequity. We aspire to live in a community where:

- Your zip code no longer determines your opportunity in life;
- Life expectancy is the same across all populations and communities in our County;
- The academic achievement gap is eliminated;
- Everyone in our community has a home;
- Community members seek understanding and awareness of their own power and privilege and actively work to end poverty in our County;
- Poverty is not generational. If it exists, it is intermittent, brief and not permanent;
- Everyone in our County is able to meet their basic needs-- housing, food, transportation, education, health expenses and childcare.

We are a team of 14 based in our Ann Arbor office. Our office environment is fast-paced and supportive. Our collective work is grounded by the values below:

- **Equity-** We pursue greater access to opportunities and resources for all. Our workplace practices, culture and impact reflect our commitment to justice and fairness.
- **Inclusiveness-** Those we interact with feel valued, respected and supported. We seek out diverse voices and perspectives to inform our work.
- **Community-** We advance our mission through collaboration. We share decision making, power and resources.
- **Volunteerism-** We value contributions of time and talent. We continuously seek opportunities to engage volunteers in our work.
- **Caring-** We display empathy with those we work with and assume the positive intention of others.
- **Integrity-** In all our actions we will choose to do the right thing even though it may not be the easiest thing.

You will be responsible for:

- Working one-on-one with individuals in our community to build their financial capability, change their financial behaviors and support their financial goal achievement through:
 - Conducting and coordinating intake and holistic assessments of individuals
 - Exploring with individuals their values and beliefs around money, and how this is helping or hindering their money management and goal attainment
 - Assisting individuals in identifying and addressing current financial opportunities and challenges
 - Developing with individuals a tailored coaching plan that includes a combination of: spending plan creation, credit building, debt management, tax preparation, benefits screening, and referrals to other available social services.
 - Tracking and compiling outcomes of services provided; providing information and preparing reports for internal and external use on a periodic basis
- Facilitating financial education workshops - providing financial education in a group format using a variety of facilitation methods designed to equip people with the money management tools needed to progress towards their financial goals.
- Being part of a team- We are looking for individuals that are looking for a team environment that is inspired to shape the future with each other and our community. Shared responsibilities include:
 - Managing external relationships with a broad spectrum of community partners
 - Developing content expertise in: financial education, financial coaching, community partnerships, adult learning

If you are the ideal candidate, you:

- Love being part of a team;
- Are passionate about making it easier for community members to make healthy financial choices;
- Are a life-long learner and consistently look for opportunities to improve your work and yourself;
- Enjoy working directly with members of our community;
- Get a thrill from seeing the impact of your effort on people's lives through data;
- Are committed to social justice work. So committed you've demonstrated this with prior volunteer service and community involvement;
- Are willing to do what needs to be done when it needs to be done.

Requirements:

- Non-profit organizational work, community development, project/program management or finance (3+ years experience)
- Prior experience working directly with community members (1+ years experience)
- Database management (demonstrated experience)
- Microsoft Office computer applications (proficient)
- Current driver's license
- Acceptance of work outside of normal business hours

Preferred Qualifications:

- NeighborWorks America certified in Financial Capability
- Experience providing one-on-one financial coaching
- Experience in facilitating group workshops
- Educational degrees and professional certifications/designations
- Prior coursework in financial education principles and practices

Timing:

Applications are due by Friday, February 22nd. Final candidates will be chosen on or before Friday March 22nd.

Compensation:

We are open to hiring in for a part-time or full-time role. What we are looking for is the right fit. UWWC's compensation plan includes a mix of salary and benefits including health insurance, 401k with employer match, and generous paid time off. The range for this role as a full time position is presently **\$32,000 - \$36,000**.

How to apply: If this sounds like you, please submit a resume and cover letter describing your qualifications for this position to hr@uwwashtenaw.org by Applications are due by Friday, February 22nd.

United Way of Washtenaw County, an Equal Opportunity Employer, seeks to reach a broad and diverse candidate pool when filling vacant positions. We strongly encourage applications from people with diverse backgrounds, because this is what it means to Live United. You are valued. And you belong here.