

## **LAKE AREA UNITED WAY (LAUW) POSITION DESCRIPTION**

**To apply, please send cover letter and resume to [apb@lauw.org](mailto:apb@lauw.org).**

Position Title: Financial Wellness Coalition Coordinator

Classification: Part-time

Hours: 15-20 hours/week

Division: Community Impact

Reports to: Vice President, Community Impact

### Purpose of Position:

The Financial Wellness Coalition Coordinator (FWCC) is responsible for recruiting, convening, and supporting Financial Wellness Coalition members from financial services, government, and nonprofit sectors as well as employers that are enthusiastic about helping ALICE (Asset Limited, Income Constrained, Employed) families become financially sustainable. The FWCC assists the coalition to oversee and manage its operations, including: coalition meetings and communication; community engagement; strategy development, implementation and evaluation.

### Duties and Responsibilities:

1. Assist the coalition in assessment, planning, implementation and evaluation activities, including the Bank On initiative and other strategies that the coalition may create,
2. Work closely with the Level Up Financial Wellness Navigator and financial education/product partners like Northwest Indiana Reinvestment Alliance and Northwest Indiana Community Action (IDAs)
3. Develop meeting schedules and agendas
4. Record minutes of coalition / committee meetings and ensure timely distribution to coalition membership
5. Facilitate the organization of committee meetings
6. Keep coalition and committees focused on activities that will meet projected outcomes
7. Facilitate the organization of public coalition events and trainings
8. Assist with developing relationships with residents, stakeholders and other community members
9. Act as a subject matter expert for the coalition
10. Assist in recruiting new coalition members
11. Document coalition activities and progress toward outcomes in reports to lead agency, funders, coalition members, and broader community (where appropriate)
12. Continually maintain and develop content for promotional and reporting purposes
13. Assist in financial wellness advocacy efforts
14. Other duties as assigned

### Job Relationships:

Frequent contact with LAUW staff, volunteers, agency executives and staff, and general public.

### Qualifications:

- Computer skills and knowledge of relevant software, particularly Microsoft Office programs like Word, Excel and Outlook, and Zoom.
- Bachelor's Degree or equivalent in experience
- Previous experience in a client-facing or customer service position
- Possess a working knowledge of service providers, including State, Federal and Local assistance
- Ability to self-manage and at times handle multiple projects/responsibilities
- Knowledge of communities across Lake County and their unique characteristics, demographics & needs
- Established relationships with communities and/or community stakeholders
- Dedication to supporting and furthering diversity & inclusion inside and outside of the organizations
- Desire to continually learn and improve and the ability to provide and accept feedback
- Problem solving & critical thinking skills; ability to handle ambiguity and uncertainty.

### Key Competencies:

- Ability to work independently
- Attention to detail and accuracy
- Communication skills - written and verbal
- Public speaking and presentation skills
- Listening skills
- Planning and organizing
- Prioritizing
- Problem assessment and problem solving
- Information gathering and monitoring
- Flexibility
- Adaptability
- Customer service orientation
- Teamwork

### Physical Demands:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit and talk or hear. The employee frequently is required to walk and/or drive. The employee is occasionally required to stand. The employee may occasionally lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision, distance vision, depth perception, and ability to adjust focus.

Work Environment:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Typical office environment with minimal noise from office equipment i.e., printers. Frequently the employee must drive to appointments, events, and networking opportunities. The employee must provide his or her own transportation/insurance.

Due to COVID-19 our office has transitioned temporarily to remote work for some positions. This position has the option of working remotely. Masks and social distancing are required while in the office and in the course of doing business with other people.

Position Type / Expected Hours of Work

Part time (15-20 hours/week)

Travel:

Travel is primarily local during the business day, although some out-of-area and overnight travel may be expected for training. Reliable transportation is required.

Other Duties:

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.

Pay rate: \$18-\$20/hour depending upon experience.

Signatures:

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Supervisor

Date

Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

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Employee

Date