



## **UNITED WAY OF TUCSON AND SOUTHERN ARIZONA Position Description**

### **Project Manager, Financial Wellness**

**Full-Time, Non-Exempt**

**July 2021**

**Salary Range: \$33,000 - \$38,000**

#### **JOB DESCRIPTION:**

United Way of Tucson and Southern Arizona's mission is to build a thriving community by uniting people, ideas, and resources. The Financial Wellness Team at United Way of Tucson and Southern Arizona works with partners to improve the financial stability and security of residents of Southern Arizona. A financially well household can cover the cost of its basic needs, save for emergencies and planned expenses, make informed financial decisions, and maintain stability as members pursue opportunities or navigate life changes. Achieving financial wellness requires equitable access to and use of resources related to income, employment, benefits, financial coaching, money management, credit, banking, insurance, loans, and more.

This person in this position reports to and provides support to the Senior Director, Financial Wellness Initiatives, primarily assisting with the tasks and responsibilities associated with the facilitation and development of the Financial Wellness Partnership and its initiatives. The position is based in Tucson and will require occasional travel outside of Tucson. Funding for the position comes from grants. The Manager will also provide support to the Senior Director, Financial Wellness Resources, assisting with grant writing and management tasks, and related activities.

The person in this position will play a key role in creating equitable, systemic change for the benefit of low- and moderate-income residents of Southern Arizona, and the successful candidate will bring knowledge and experience—and a desire to learn more—in facilitation, training, project management, and grants.

#### **RESPONSIBILITIES:**

- Collaborate with Senior Director of Financial Wellness Initiatives to plan, facilitate, and track deliverables related to Financial Wellness Partnership meetings;
- Support program development, materials, and logistics for special events and forums;
- Create content and support communications efforts, including the monthly Financial Wellness newsletter, website pages, and resource emails;
- Monitor social media and thought leadership websites for news, research, and reports relating to financial wellness;
- Maintain contact lists, attendance tracking, meeting notes, follow-up items, and resource lists for Financial Wellness Partnership;
- Assist with projects that arise from working groups, such as surveys, assessments, and educational efforts;

- Assist the Senior Director of Financial Wellness Resources with grant writing and reporting as needed;
- Assist the Financial Wellness Team in other activities as assigned;
- Performs duties in accordance with United Way policies and procedures.

**QUALIFICATIONS, SKILLS AND ABILITIES**

- Bachelor’s Degree.
- Experience and knowledge about facilitation of meetings and workshops, project management, and training, and a strong desire to gain more experience and knowledge.
- Strong organizing skills; Ability to be very detail-oriented, with strong conceptual skills as well;
- Strong verbal and written communication skills; bilingual proficiency in English and Spanish is helpful;
- Strong computer software skills in word processing, spreadsheets, and databases, along with comfort with social media and other apps;
- Ability to manage multiple tasks, sometimes under time constraints;
- Enjoys working on teams;
- Must possess a valid driver’s license, current auto insurance, daily access to reliable vehicle;
- Must be able to lift and carry 30 pounds.

<b>Reviewed By:</b>	<b>Signature</b>	<b>Date</b>
Hiring Manager		
Chief Impact Officer		
Chief Operating Officer, EVP		
President & CEO		

Employee Acknowledgement of Receipt of Job Description:

<b>Name (please print):</b>	<b>Signature</b>	<b>Date</b>