



Bank On Martinsville-Henry Fellow Job Description

Background

As a part of Bank On, cities across the country have formed coalitions to expand banking access efforts; to date, at least three million people have opened bank accounts certified as meeting the [Bank On National Account Standards](#). The [Cities for Financial Empowerment Fund](#) (CFE Fund), leads the national Bank On initiative and the multi-city Fellowship Program. The Bank On Fellowship Program is a national initiative focused on building a multi-city cohort of successful Bank On program coordinators, equipping them with the training, tools, and resources to make significant advancements in local banking access efforts and at the same time generating best practices for other coalitions around the country. Please refer to www.cfefund.org/bankon for more information about the national Bank On movement.

The United Way fights for the Health, Financial Stability and Education of every individual throughout Martinsville and Henry County. The work carried out through this position will further advance these goals. The United Way of Henry County and Martinsville is looking for an exceptional candidate to champion banking access work throughout Martinsville and Henry County. The United Way of Henry County and Martinsville is an equal opportunity employer and does not discriminate based on any protected class.

Fellow position

The Bank On Fellow will be a member of the Bank On Fellowship cohort who will work collaboratively to provide leadership to Bank On Martinsville-Henry initiative to make significant advancement in local banking access efforts. The Fellow will be responsible for directing and realizing the vision of Bank On Martinsville-Henry, overseeing day-to-day operations, and coordinating with the CFE Fund. This fellowship is a *minimum one-year commitment*, with the expectation to continue to lead the Bank On coalition beyond the Fellowship.

Key job responsibilities include the following:

- **COALITION MANAGEMENT:** Cultivate new and existing relationships with local, regional, and national partners including city, county and state officials; banks and credit unions; community organizations; researchers and advocates; and banking regulators including the Federal Deposit Insurance Corporation, Federal Reserve Bank, Office of the Comptroller of the Currency, Department of the Treasury, and National Credit Union Administration. Develop and support a multi-sector Bank On Advisory Committee.
- **BANK ON NATIONAL ACCOUNT STANDARDS:** Work with financial institutions who do not yet offer nationally certified products that meet the [Bank On National Account Standards](#) to achieve certification.
- **PARTNERSHIP INTEGRATION:** Identify and cultivate opportunities to incorporate banking access into existing program infrastructure. Work with program partners to implement successful integrations. Lead



meetings with senior staff within municipal agencies, financial institutions, and community-based organizations to develop and advance local coalition initiatives.

- PROGRAM ADMINISTRATION: Design Bank On Coalition strategy, manage Bank On program budget, oversee Bank On team (as applicable)
- DATA: Track, analyze and report data about Bank On activities.
- CONTENT EXPERTISE: Serve as a resource to the community around banking and financial empowerment issues.
- SUSTAINABILITY AND FUNDRAISING: Identify and cultivate relationships with local funders and public funding source entities to seek ongoing public and private support to ensure program remains financially sustainable. Identify and leverage opportunities for in-kind and pro bono support for the program.
- MARKETING/MEDIA: Create an appropriate marketing and outreach strategy to reach unbanked local residents. Incorporate public service messages to encourage opening of safe and affordable accounts.
- TRAINING: Work with relevant partners to ensure awareness about and accessibility to certified banking products. Lead forums and manage external relationships to communicate the value and mission of program
- LEARNING COMMUNITY: Work with the CFE Fund to support the local Bank On program model and coordinate on the multi-city Fellowship cohort initiative. Actively participate in the Bank On Fellows learning community opportunities. Assist in reporting to the CFE Fund on Fellowship activities and program progress.
- COMPLEMENT BANKING ACCESS GOALS: Train program partners who will engage clients around financial education and banking access issues.
- TRAVEL AND VIRTUAL CONVENING (depending upon public health guidelines): As applicable, some national and local travel, as well as at least one mandatory virtual training June 15-17, 2021.

Minimum Qualifications

Education

- Bachelors degree and 5-7 years of professional experience strongly preferred
- Masters degree in Business, Social Science, Public Administration or a field directly related to the type of work performed preferred

Experience

- Minimum of two years experience independently running a program or project required
- Deep relationships/network with community, including financial institutions, community-based organizations and local government strongly preferred.
- Familiarity with financial empowerment issues including banking, mainstream financial products, and Community Reinvestment Act preferred
- Familiarity with challenges facing unbanked/underbanked individuals preferred
- Strong background in community organizing, coalition management, or multi-sector collaboration required



- Experience with public speaking and communications experience required
- Experience in grant writing/budget management preferred

Skills

- Advanced interpersonal and communication skills with the ability to work closely with a wide range of constituents, including comfort leading meetings with senior-level staff within municipal agencies, financial institutions, government partners, funders, and community-based organizations required
- Excellent written and presentation skills required
- Compassion and understanding of the social issues/structures surrounding the complexities of being unbanked.

Details

- This is a full-time, grant funded position. Additional tasks and duties may be assigned by the Executive Director
- Competitive salary and excellent benefits are included in employment package
- The United Way is an Equal Opportunity Employer
- This is a grant funded position, its continuation is dependent on the availability of grant funds
- Position is open until filled
- Interested applicants should submit cover letter and resume to:

Philip Wenkstern at Philip@UnitedWayofHCM.org