



ORANGE COUNTY UNITED WAY JOB DESCRIPTION

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| Job Title: Financial Education Specialist | Reporting To: Program Manager, United For Financial Security |
| Department: United for Financial Security | Position: Full-time/non-exempt |

Orange County United Way seeks an experienced, bilingual (English and Spanish) Financial Education Specialist to provide support to the Sparkpoint OC and OC Free Tax Prep team by conducting outreach, client recruitment, facilitating trainings, teaching financial literacy classes, and data entry.

Key Duties and Responsibilities

Financial Education Specialist's responsibilities include, but are not limited to:

- Facilitate and teach financial literacy workshops in English and Spanish
- Conduct orientations and outreach events to meet program enrollment and attendee goals
- Represent OCUW at community events and resource fairs
- Manage referral and enrollment process to ensure timely response and appropriate tracking
- Work with internal departments to develop marketing materials for distribution
- Assist with all administrative responsibilities including: scheduling meetings, managing Outlook calendar, handle client communications, filing, etc.
- Provide quality customer service to all program participants and partners
- Maintain accurate records of class presentations, attendance, and evaluation data
- Complete reports as needed as directed by the Program Manager
- Participate in initiative and/or organizational programs, meetings, events, and activities
- Facilitate and teach trainings for the OC Free Tax Prep program
- Provide support as need to the OC Free Tax Prep program during tax season
- Perform other duties as assigned

Required Skills and Experience

- Must be bilingual in English/Spanish (reading, writing and speaking)
- Knowledge of issues affecting low to moderate-income households and communities in Orange County
- Ability to pass a Tax Law Certification exam upon hire (training provided)
- Strong presentation skills; the ability to interact with an audience and transmit our message
- Ability to work independently and autonomously
- High level of attention to detail
- Experience and passion for Financial Literacy programming strongly preferred



Technical Knowledge

- Computer proficiency in Microsoft Office (Word, Excel, PowerPoint and Outlook); Zoom
- Ability to learn and adapt to new tools
- Client, project, time, and database management

Compensation

\$26 – 30/hr. Competitive benefits.

Physical Demands

Physical demands are representative of the requirements necessary for an employee to successfully perform the essential functions of this position. The employee is required to actively listen and communicate clearly. The employee is required to stand and publicly speak. The employee is required to walk, reach with arms and hands, climb, balance, twist, lean, move from one location to another, and to stoop, kneel, crouch or crawl. Vision abilities required by this job include close and far. **Reliable transportation and a clean driving record are required as the employee may need to travel throughout Orange County to meet with participants and for other work engagements.** Ability to operate a computer keyboard and mouse, and lift files and reports is required. Employee must be able to lift and carry 25 pounds.

Send Cover Letter and Resume To

recruiting@unitedwayoc.org