



**ORANGE COUNTY UNITED WAY  
JOB DESCRIPTION**

<b>Job Title:</b> Financial Education Specialist	<b>Reporting To:</b> Program Manager, United For Financial Security
<b>Department:</b> United for Financial Security	<b>Position:</b> 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 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
- Create presentation content for workshops
- Partner with community organizations to schedule and facilitate workshops
- Represent Orange County United Way 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, 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
- Provide support to the SparkPoint Tax Site 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 during tax season (training provided)
- Proficient 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 is highly 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**

- \$28.00 – \$32.00 per/hour. Competitive benefits.

### **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 frequently required to be able to remain in a stationary position 75% of the time. The person in this position needs to occasionally move about inside the office to access file cabinets, records, and office machinery. Constantly operates a computer and other office productivity machinery, such as a calculator, copy machine and computer printer. Occasionally ascends/descends stairs, and constantly positions self to maintain computers in the office, including under the desks. The person in this position frequently communicates with coworkers and customers who have inquiries about our business operations and the community we service; therefore, the person must be able to exchange accurate information. The employee must occasionally lift and/or move up to 25 pounds.

### **Send Resumes To:**

[recruiting@unitedwayoc.org](mailto:recruiting@unitedwayoc.org)

Orange County United Way  
18012 Mitchell South, Irvine, CA 92614

[www.unitedwayoc.org](http://www.unitedwayoc.org)