ORANGE COUNTY UNITED WAY
JOB DESCRIPTION

JOB TITLE: FINANCIAL EDUCATION SPECIALIST, SPARKPOINT OC	**REPORTING TO:** PROGRAM MANAGER
DEPARTMENT: UNITED FOR FINANCIAL SECURITY	**POSITION:** FULL-TIME/NON-EXEMPT

Purpose of Position

Orange County United Way is seeking a passionate and bilingual (English/Spanish) Financial Education Specialist to support the SparkPoint OC team in empowering individuals and families through financial literacy. This role is responsible for conducting outreach, recruiting participants, facilitating workshops, and supporting program operations. The ideal candidate will be a dynamic presenter, a skilled communicator, and a detail-oriented administrator who thrives in a community-focused, fast-paced environment.

Key Duties and Responsibilities

Financial Literacy & Workshop Facilitation

- Design, facilitate, and teach engaging financial literacy workshops in both English and Spanish.
- Develop culturally relevant presentation materials tailored to diverse audiences.
- Partner with community organizations to schedule and deliver workshops across Orange County.
- Maintain accurate records of workshop attendance, evaluations, and outcomes.

Outreach & Participant Engagement

- Conduct orientations and outreach events to meet program enrollment and attendance goals.
- Represent Orange County United Way at community events, resource fairs, and partner meetings.
- Manage referral and enrollment processes, ensuring timely follow-up and accurate tracking.
- Provide exceptional customer service to program participants and community partners.

Program Support & Administration

- Collaborate with internal departments to develop and distribute marketing materials.
- Assist with administrative tasks including scheduling meetings, managing calendars, and handling client communications.
- Support SparkPoint OC's Volunteer Income Tax Assistance (VITA) site during tax season, including passing the IRS Tax Law Certification (training provided).
- Complete reports and data entry as directed by the Program Manager.
- Participate in organizational initiatives, meetings, and events as assigned.

Job Requirements /Technical Knowledge

Language Skills: Fluent in English and Spanish (spoken, written, and reading).
Education: Bachelor's degree preferred; minimum of 2 years of relevant experience in financial

education, case management, or community outreach.

Experience:

- Experience and passion for financial literacy programming highly preferred.
- Familiarity with issues affecting low- to moderate-income households and communities in Orange County.

Technical Skills:

- Proficiency in Microsoft Office (Word, Excel, PowerPoint) and Zoom.
- Experience with database platforms for tracking and reporting.
- Strong presentation and public speaking skills.

Other Requirements:

- Ability to work independently and manage multiple priorities.
- High attention to detail and strong organizational skills.
- Ability to pass IRS Tax Law Certification during tax season (training provided).
- Access to reliable transportation.

Compensation

- Commensurate with experience, education, and market, $25– $32 per hour. Competitive benefits.

Core Competencies

- **Customer Service** - Manages difficult or emotional customer situations; responds promptly to customer needs; solicits customer feedback to improve service; responds to requests for service and assistance; meets commitments.
- **Interpersonal Skills** - Maintains confidentiality; listens to others without interrupting; keeps emotions under control; remains open to others' ideas and tries new things.
- **Oral Communication** - Speaks clearly and persuasively in positive or negative situations; listens and obtains clarification; responds well to questions; participates in meetings.
- **Written Communication** - Writes clearly and informatively; edits work for spelling and grammar; able to read and interpret written information.
- **Teamwork** - Exhibits objectivity and openness to others' views; gives and welcomes feedback; contributes to building a positive team spirit; puts success of team above own interests.
- **Professionalism** - Approaches others in a tactful manner; reacts well under pressure; treats others with respect and consideration, regardless of status or position; accepts responsibility for own actions; follows through on commitments.
- **Language Skills** - Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals; ability to write routine reports and correspondence; ability to speak effectively before groups of customers or employees of organization.

Company Standards

All employees, in performing their respective tasks and duties, are to perform quality work within deadlines, with or without direct supervision; interact professionally with other employees, customers, and suppliers; work effectively as a team contributor on all assignments; and work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations. Willing to embrace change and new technologies. Commitment to the values and mission of Orange County United Way.

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 Cover Letter and Resume To:

recruiting@unitedwayoc.org
Orange County United Way
18012 Mitchell South, Irvine, CA 92614
www.unitedwayoc.org