United Way of Southeast Louisiana

JOB DESCRIPTION

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| Position Title: Financial Literacy Specialist, Financial Capability | |
| Reports to: Senior Financial Education Specialist | |
| Location: 2401 Canal Street, NO, LA 70119 | Division: Community Impact |
| Classification: Non-Exempt – Salary $43,000 | Supervises: N/A |
| General Functions: The Financial Literacy Specialist's primary responsibility is to promote and enhance financial literacy among individuals and communities. You will develop and implement educational programs, workshops, and resources to empower people with the knowledge and skills to make informed financial decisions. This role requires a deep understanding of financial principles, excellent communication skills, and the ability to tailor information to diverse audiences. | |

**CORE COMPETENCIES for ALL UNITED WAY PROFESSIONALS:**

* **Mission-focused** – top priority is to create real social change that leads to better lives and healthier communities.
* **Relationship-oriented** – understands that people come before process and is astute in cultivating and managing relationships toward a common goal.
* **Collaborator** – understands the roles and contributions of all sectors of the community and can mobilize resources (financial and human) through meaningful engagement.
* **Results-driven** – dedicated to shared and measurable goals for the common good; creating, resourcing, scaling, and leveraging strategies and innovations for broad investment and impact.
* **Brand Steward** – understands their role in growing and protecting the reputation and results of the greater network.

**ESSENTIAL FUNCTIONS:**

1. **Program Development:**

* Design and develop financial literacy programs and materials suitable for various age groups, demographics, and levels of financial knowledge.
* Collaborate with internal teams and external partners to ensure the relevance and effectiveness of financial education initiatives.
* Strong knowledge of financial principles, including budgeting, saving, investing, and debt management.

1. **Workshop Facilitation:**

* Conduct engaging and interactive financial literacy workshops for individuals, schools, community groups, and organizations.
* Customize presentations to address specific financial topics, such as budgeting, saving, investing, debt management, and retirement planning.

1. **Resource Creation:**

* Create educational materials to support financial literacy initiatives, including guides, worksheets, and online resources.
* Stay updated on financial trends and regulations to provide accurate and current information.

1. **Community Outreach:**

* Build relationships with community organizations, schools, and businesses to promote financial literacy initiatives.
* Collaborate with local leaders and influencers to expand the reach of financial education programs.

1. **Individual Counseling:**

* Provide one-on-one financial counseling and guidance to individuals seeking personalized assistance.
* Address specific financial concerns and help clients develop practical strategies for financial success.

1. **Data Analysis and Reporting:**

* Collect and analyze data on the impact and effectiveness of financial literacy programs.
* Prepare regular reports for stakeholders, showcasing outcomes and areas for improvement.

1. **Professional Development:**

* Stay informed about changes in the financial industry, regulations, and educational best practices.
* Attend conferences, workshops, and training sessions to enhance financial knowledge and instructional skills.

1. **Cultural Competency:**

* Demonstrate cultural sensitivity and an understanding of diverse populations, ensuring services are inclusive and accessible to all.

1. **Travel:**

* Develop a weekly schedule and travel to assigned parishes to engage with families and provide support.

1. **Other Responsibilities:**

* Perform other work-related duties as assigned.

**JOB QUALIFICATIONS:**

1. Bachelor's degree in finance, economics, education, or a related field.
2. Proven experience in developing and delivering financial education programs.
3. Strong organizational skills and meticulous attention to detail.
4. Excellent written and verbal communication skills, including proper telephone etiquette.
5. Proficiency in Microsoft Office Suite (Word, Excel, PowerPoint, Outlook) and basic office software.
6. Ability to work effectively both independently and collaboratively within a team.
7. Passion for community service and a deep commitment to the United Way's mission.
8. Self-motivated, quick study, and able to work effectively with minimal supervision.
9. Strong interpersonal skills with the ability to initiate, build, and continuously strengthen partnerships with a diverse population.
10. Must maintain a valid driver’s license, minimum insurance, and reliable transportation.
11. Ability to adapt to changing circumstances and cognitively respond appropriately and with discretion.
12. Demonstrated ability to use sound judgment to handle/resolve details and matters not requiring the personal attention of the supervisor.
13. Unquestioned confidentiality with sensitive financial and personnel matters and issues
14. Must be available to work a regular Monday-Friday work week with occasional early morning, evening, and weekend availability as needed.
15. Have no outside business interests that may conflict with the organization's goals and objectives and not explicitly approved by the President/CEO

Signed Financial Literacy Specialist: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_

Signed Senior Financial Education Specialist\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_

*Rev. 10/2023*