

The United Planning Organization (UPO) is the designated Community Action Agency for Washington, District of Columbia, and has served the residents of the District since 1962. Our **Vision** for the future is “UPO’s Washington: A city of thriving communities and self-sufficient residents”; our **Mission** is “Uniting People with Opportunities.”

UPO is committed to attracting and retaining outstanding and diverse staff who will enhance our engagement and **service** in our communities.

All qualified applicants are encouraged to apply for this position or any other position currently advertised on our website. Please visit us at www.upo.org to view all of our vacancies and to learn more about our company and services.

POSITION: Tax & Financial Literacy Manager
OFFICE/DIVISION: Community Reinvestment Division
BULLETIN No: 02062019
SALARY RANGE: \$52,000 to \$57,750 (Commensurate with experience)
OPENING DATE: 06/13/2019
CLOSING DATE: Open until filled
FIRST SOURCE: N/A

MAJOR DUTIES:

Manage and implement Financial Literacy Programs including the UPO VITA tax program, IDA savings programs and other programs that meet the financial literacy and financial education needs of UPO customers.

BRIEF DESCRIPTION:

Manage the design and staffing of the VITA tax program. Set staffing and budget targets for program implementation and make recommendations of the same to the Division Director. Manage the design and staffing of the financial education and micro business initiatives. Develop partnerships with local banks, financial institutions, and community-based organizations to expand financial education services for UPO’s clients. Manage the program delivery, design and staffing of financial education counseling and training to customers, including workshops and one-on-one counseling sessions. Help develop resources to fund IDA, tax, small business and financial literacy initiatives. Implement regular evaluation of financial education service. Prepare monthly and quarterly budget and program performance reports for review by the Division Director. Serve as Site Coordinator of the UPO VITA tax program.

MINIMUM QUALIFICATIONS:

Certification in tax preparation and financial education. Minimum of three years of experience managing VITA tax site. At least one year of experience designing and teaching financial literacy classes. Excellent MS Office skills, tax software and ability to work independently. Must be able to work some weekends and evenings.

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Tax & Financial Literacy Manager
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DESIRED QUALIFICATIONS:

Bachelor degree in finance, accounting, business administration or extensive experience in managing VITA tax and financial literacy programs. Experience and or training in providing financial advice to small businesses (reviewing financial statements, business plans, operating budgets, etc.) Non-profit management experience.

OTHER REQUIREMENTS:

In the event that an offer is extended, the candidate will be required to successfully complete a criminal background check and/or FBI fingerprinting, and pre-employment drug screening as applicable for the position.

This position IS not covered under the collective bargaining agreement.

To apply for this position, please submit your cover letter and resume to upojobs@upo.org or fax these documents to 202/319-3237.