

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 and Financial Literacy Manager
OFFICE/DIVISION:	Community Reinvestment Division
BULLETIN No:	1162022
SALARY RANGE:	(Commensurate with experience)
OPENING DATE:	June 27, 2022
CLOSING DATE:	Open until filled
FIRST SOURCE:	N/A

MAJOR DUTIES:

Manage UPO Financial Literacy Programs including UPO VITA.

BRIEF DESCRIPTION:

Manage the design, implementation, and staffing of UPO Financial Literacy Programs. Manage the design, implementation of micro business initiatives. Manage the program delivery, design and staffing of financial education counseling and training to customers, including workshops and one-on-one counseling sessions. Set appropriate objectives, activities, goals, and projected outcomes for each program. Provide budget and program performance reports as required. Serve as Site Coordinator for the UPO VITA Tax Program.

MINIMUM QUALIFICATIONS:

Bachelor’s degree in business or other related field. Two (2) years of experience in finance, financial education, counseling/coaching, or social service delivery in credit and/or financial management. Possess at least 2 years of supervisory experience.

Must have experience and relevant certification in tax preparation, and CFE certification. **Must be able to meet requirement to become a VITA Site Coordinator within 30 days of hire.** Must have effective organizational and professional communication skills, both written and verbal. Must be able to work sensitively and effectively with individuals of diverse educational, socio-economic, and cultural backgrounds. Must be able to work some weekends and evenings.

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DESIRED QUALIFICATIONS:

Master's degree in financial management, banking, accounting or other related field. CFE certified with at least four years of work experience, with background in finance, financial education, counseling/coaching, or social service delivery. Prior experience in a non-profit organization. Prior experience as a VITA Site Coordinator. Prior experience in the tax preparation field. Possess highly effective organizational and professional communication skills, both written and verbal. Bilingual Spanish.

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.

Special notice to all applicants:

In accordance with the Mayor's Order (see reference below), every UPO employee, except for those with a medical or religious exemption, must be vaccinated by September 19, 2021. UPO abides by the requirements of all Mayor's Orders regarding COVID-19 Vaccinations; the Orders relate to the program under which you will work. **Mayor's Order 2021-099 - COVID-19 Vaccination Certification Requirement for District Government Employees, Contractors, Interns, and Grantees**

This position IS not covered under the collective bargaining agreement.

ALL VISITORS TO UPO FACILITIES

- **Must Wear a Mask While on UPO Premises;**
- **Must Practice Social Distancing; and,**
- **Will Be Subject to Temperature Scanning Upon Entering UPO Facilities**

Submit your cover letter and resume to the Career Center Online [Apply Here](#)