

Director, Earn It! Keep It! Save It!

Department: United Way Bay Area
Reports to: Vice President, Program Operations
Classification: Management
Closing Date: Open until filled

An Equal Opportunity Employer Committed to a Diverse Workforce

Overview:

The United Way Bay Area (UWBA) is leading a network of corporations, government agencies, nonprofits, and individuals to create lasting change for Bay Area residents and families. With a history that spans over 90 years and programs that tackle the issue of local poverty from every angle, UWBA is uniquely positioned to mobilize and motivate all sectors of the community toward the vision of ending the cycle of poverty.

As UWBA responds to cultural shifts in the workplace, fundraising, and digital communications, it is guided by core values of innovation and results-driven creativity. Through a variety of existing and emerging initiatives, UWBA seeks to both strengthen and reimagine its work at all levels in order provide more and better opportunities for struggling Bay Area residents.

For more information about UWBA, please visit <http://uwba.org>.

The Opportunity:

Earn It! Keep It! Save It! (EKS) is a United Way Bay Area-led program which provides low-income working families with free tax return preparation, assistance with filing tax credit claims, and asset accumulation and growth information. The program supports United Way's goal of helping low-income working families become self-sufficient and save money for their future. The EKS Director is a management position which leads the effective and successful implementation of this 8-county regional free tax preparation program and provides high level strategic program support and leadership to 8 counties.

The target outcome of this project is to increase the assets of EITC-eligible families, and this position will be responsible for developing and implementing greater asset building linkages and integrating these into the campaign year-round. This position is located in United Way Bay Area's San Francisco office, and requires local travel to eight Bay Area counties. This is a management position reporting to the VP, Program Operations. This position is dependent on continued funding.

What you'll do:

Program and Evaluation

- Lead overall program design, implementation, and strategic planning and program growth
- Coordinate and oversee the planning and implementation of free tax assistance services in eight Bay Area counties, by serving as broker with IRS to plan volunteer training, implement quality assurance procedures, monitoring site performance, and planning for coalition needs
- Design and deliver program trainings to site coordinators
- Coordinate management and improvement of VITA volunteer training, in partnership with IRS
- Provide technical assistance and support to VITA coalition partners
- Management of County EKS campaigns, as assigned, and provide guidance to other counties
- Develop program strategies to achieve target outcome of families attaining financial assets.
- Build and expand on current asset building linkages at tax sites, specific to county needs
- Set and achieve measurable target outcomes for tax preparation and asset building services.
- Serve as lead EKS staff to specific counties as assigned
- Support client survey data collection, aggregation, analysis; software technical assistance and troubleshooting to VITA sites; reports on program metrics, including data points, demographics, asset support and uptake trends, and other program results as needed

Partnership and Collaborative Management

- Cultivate and maintain strategic partnerships with organizations, programs, businesses, local and national partners which support EKS program goals including, but not limited to, community based organizations, municipal and county agencies and the IRS SPEC division
- Represent EKS at community meetings across the region

Marketing and Development

- Lead program fundraising activities, working closely with UWBA's Development team, including and not limited to: prospecting, report and proposal writing, budget development, grants monitoring, meeting funder reporting requirements, contacts with funders.
- Represent EKS at public speaking engagements during the United Way Bay Area workplace campaign and other opportunities throughout the year
- Participate in ongoing development and updating of promotional strategies including all printed materials & website; assist with distribution of promotional materials
- Work with UWBA Marketing/PR to implement successful media coverage, including press conferences and events, new story ideas, individual success stories, interviews, video PSAs and radio news releases.

Administration and Management

- Maintain and update various program documents including committee/coalition rosters, grant report schedules, and program budgets
- Provide oversight/coordination of specific projects as assigned
- Ensure program expenses are in line with the program budget for each fiscal year
- Coordination of contracts with participating agencies, and monitor invoice receipt and payment, and report submission of grantee reports and success stories.
- Supervise EKS program staff as assigned

Who you are:

- Knowledge of/Experience managing data analysis procedures and logistics preferred
- Experience working effectively with diverse populations; knowledge of guidelines to successfully work in a culturally sensitive environment
- Experience community building and working in collaborative partnerships with other organizations, agencies, institutions, and entities
- Demonstrated leadership, coaching, and mentoring skills
- Experience with event planning
- Demonstrated ability to support/lead collaborative projects - both with internal staff and community based coalitions
- Grant writing and fund development experience for public or nonprofit agencies;
- Four or more years of related professional work experience in a non-profit or human service organization, specifically experience in the field of financial capability or VITA preferred
- Excellent written and verbal communication skills
- Master's degree in Social Welfare, Non-profit Management, or Public Administration is most desirable; bachelor's degree or equivalent experience will be reviewed
- A California's Driver License and consistent, reliable access to a car for work-related travel
- Bilingual oral and written competency in Spanish is desired

Salary: \$72,000.00 - 77,000.00 Salary Exempt

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 regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms; and talk or hear. Specific vision abilities required by this job include close vision, color vision, and ability to adjust focus.

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 regularly required to sit; use hands to finger, handle, or feel; reach with hands and arms; and talk or hear. Specific

vision abilities required by this job include close vision, color vision, and ability to adjust focus.

UWBA does not discriminate on the basis of race, color, gender (including actual or perceived gender, and gender identity), sexual orientation, age, marital status, medical condition, religious affiliation, veteran status, national origin, citizenship status, mental or physical disability, or any other characteristic protected by applicable state, federal or local law. UWBA will consider qualified applicants with criminal histories in the manner consistent with the requirements of the San Francisco Fair Chance Ordinance. If you need a reasonable accommodation in order to apply for a job, please let us know. If the reason you need an accommodation is not obvious, we may ask for documentation confirming your functional limitations.

Please include salary requirements in cover letter.

TO APPLY

Login at www.uwba.org/careers and submit your resume along with cover letter