**United Way of West Florida**

**Position Description**

**Position/Title:** Financial Security Manager

**Incumbent/Candidate:** OPEN

**Reports to:** Community Impact Senior Manager

**Exempt/Non-exempt:** Non-Exempt

**Pay Rate**: $20.00 Hour

**General Description:**

The Financial Security Manager manages programs and engages in partnerships that work to improve the financial security of individuals and families in Escambia and Santa Rosa Counties. The Financial Security Manager works to identify programs and resources in the community that will benefit individuals and families through education, engagement, and collaboration. The Financial Security Manager is also responsible for growing a year-round financial education program that aligns with United Way of West Florida’s (UWWF) mission, vision, and strategic plan to support individuals and families within and below the Asset Limited, Income Constrained, Employed (ALICE) threshold.

**Responsibilities:**

**Financial Security Programs:**

* Understand and apply ALICE data to inform and align services with the needs of the target population.
* Design, implement, and expand year-round financial security programming that supports individuals and families in achieving greater financial security.
* Recruit participants through community networks, outreach, and Volunteer Income Tax Assistance (VITA) clients.
* Create partnerships to enhance financial security programming.
* Conduct research on programming to enhance strategic planning.
* Educate the public on programming and the benefits of participating.

**Volunteer Income Tax Assistance (VITA) Program:**

* Manage and oversee the VITA program, including volunteer recruitment, training, site coordination, and compliance with IRS standards.
* Familiarize and become knowledgeable in the VITA program.
* Secure annual IRS VITA advanced certification
* Supervise VITA intern, if applicable
* Maintain accurate reporting for IRS and UWWF and other grants and sponsorships.
* Lead grant writing and grant management for VITA and Financial Security initiatives.
* Collaborate with community partners by connecting clients to programming and sharing resources.
* Support technical site operations, including oversite of site coordinators
* Ensure program quality through data analysis, reporting, and continuous improvement, including but not limited to volunteer pre/post surveys and taxpayer surveys.
* Promote the program through impact reports and client/volunteer stories
* Provide post-season client support as needed.
* Ensure all VITA sites adhere to IRS and UWWF standards.

**Financial Stability Coalition:**

* Support UWWF as the lead agency for the EscaRosa Financial Stability Coalition, coordinate and oversee all Coalition meetings.
* Work with the Coalition to maintain an updated strategic plan.
* Establish MOU’s for EscaRosa Financial Stability Coalition members.
* Participate as a member of key community partnerships and initiatives that are aligned with the work of UWWF’s financial stability work, i.e. Parent University.

**Other responsibilities:**

* Demonstrate a deep understanding of the challenges and needs faced by the programs target populations.
* Identify financial and in-kind support for UWWF’s financial security work.
* Participate in Community Impact Department team meetings and United Way all-staff meetings and events.
* Represent UWWF financial security work along with all UWWF programs and services within the community.
* Update appropriate database systems with pertinent information.
* Any other duties as assigned.

**Qualifications**

* Bachelor’s degree preferred
* Must be willing to submit a credit report from the last three months to be considered.
* At least 5 years’ experience in financial literacy, financial coaching, tax preparations, or program management required.
* 2-4 years’ work experience, preferably in the non-profit field.
* Previous relevant volunteer management experience preferred.
* Excellent oral and written communication skills.
* Ability to work collaboratively with a diversity of people and organizations.
* Ability to work well in a fast-paced environment, and display a supportive and professional disposition with diverse populations
* Experience with public speaking.
* Excellent organizational skills and detailed oriented.
* Strong analytical skills.
* Strategic thinker.
* Proven ability to work independently.
* Strong computer skills and proficiency in MS Office Suite.
* Ability to learn and use other software to support programs.
* Must have a driver’s license and reliable transportation.

### **Key Competencies**

* Mission focused
* Strong interpersonal skills
* Relationship-oriented
* Collaborator
* Results driven
* Brand Steward
* Team builder
* Self-management