

Position: VITA Specialist
Type: Full-Time (40 hours) Non-Exempt
Reports to: Community Impact Director, Financial Stability
Department: Community Impact

Summary of Position:

In collaboration with team members and the Director, this position leads United Way Monterey County's (UWMC) Volunteer Income Tax Assistance (VITA) program and supports other asset building programs for low to moderate income taxpayers as well as individuals with limited English proficiency in Monterey County. VITA volunteers provide free tax services at community and neighborhood locations so that taxpayers receive their full federal and state refund to pay expenses, reduce debt, and increase savings. Typically, the VITA program engages over 100 volunteers to support residents to complete tax returns.

Responsibilities and Duties:

- Develop and implement VITA Service Delivery Plan to ensure program sites are accessible to clients, consistently staffed with trained volunteers, and able to meet program goals.
- Collaborate with local and county partners including the IRS, colleges, universities, and other organizations to draft and implement agreements for tax sites, volunteer recruitment, training, site management, client outreach, and other activities for the VITA program.
- Work with IRS partner and local volunteer instructors to develop and implement Volunteer Training Plan with in-person and online options that enable volunteers to provide professional, high-quality service to clients.
- Develop and implement volunteer management plan to recruit, train, schedule, recognize, and retain volunteers during and after tax season.
- Work with marketing team to develop program materials for training, marketing outreach, and fundraising.
- Present to diverse audiences on program topics such as the VITA program and eligibility for the Earned Income Tax Credit and Child Tax Credit.
- Track grant application and reporting deadlines and ensure timely submission of reports required by funders of UWMC programs.
- Support UWMC program proposals and fundraising activities.
- Other duties as requested.

Core Competencies:

- *Mission oriented* – Performance and professional motivations are driven by a commitment to creating 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* – Steward of the United Way brand and understands his/her role in growing and protecting the reputation and results of the organization and greater network.

Functional Competencies:

- *Strategic Community Collaborator* - Engages diverse stakeholders to accurately and effectively assess community needs and with credibility, authenticity and humility strategically guides United Way to contribute to Monterey County's priorities.
- *Effective & Engaging Communicator* - Is an effective and passionate communicator, articulating the United Way message in a way that inspires other to act in service to the organization and the community.
- *Critical Thinking & Creative Problem Solving* - Able to address and manage complex issues to achieve desired results. This includes the ability to gather, interpret and use relevant data to drive strategy development, make decisions and drive for results.
- *Planning & Implementation* - Leads and takes initiative in planning and developing initiatives within impact areas to achieve results that drive collective community outcomes.
- *Embracing & Managing Change* - Champions and facilitates change to ensure long-term community sustainability. Adapts successfully to changing needs while maintaining positive relationships with all constituents, internal and external.

Qualifications/ Desired Skills:

- Strong commitment to serving clients equitably and supporting volunteers as resident stakeholders.
- Experience with program development, training, grant management, and marketing.
- Experience with volunteer management, recruiting, and development.
- Ability to organize, focus on details, and follow through with commitments.
- Effective writing and speaking skills with diverse audiences including funders, clients, and partner organizations.
- Knowledge of human services systems and community services in Monterey County preferred.
- Bachelor's degree or equivalent experience.
- Bilingual Spanish Speaker highly preferred.

Position Requires:

- Ability to work varied hours, including early mornings, evenings, and/or weekends.
- Computer proficiency in word-processing, spreadsheet, and database systems.
- Valid driver's license and a reliable automobile.
- Ability to lift, carry and transport a 20-pound box.

Compensation: \$22.69- \$28.36 per hour depending on experience

Benefits: Benefits include healthcare, dental, vision, retirement plan, disability, life, and generous paid time off and holiday policies.

To Apply:

Please submit a resume and cover letter to:

Tina Engquist

Director of Operations

United Way Monterey County

tina.engquist@unitedwaymcca.org

United Way Monterey County is an Equal Opportunity Employer.