

Recruitment Announcement

Financial Assistance Services Project Manager

Oct 18, 2022

OCCAC Mission:

Leading a revolt on poverty through education, empowerment, and engagement

OCCAC Values:

Integrity. Accountability. Advocacy. Community

Okanogan County Community Action Council is seeking an initiative-taking Financial Assistance Services Project Manager to support our Tax Credit Community Outreach Program; a Grant Funded position currently funded through June 2023.

Salary: \$33 per hour with medical, dental, vision, Simple IRA. Non-Exempt

Deadline for Application: October 31, 2022, for first review. Position open until filled. Email cover letter, resume, and three professional references to HR@occac.com and/or call 509.422.4041 or 509.283.1046 with questions.

For a complete Job Description, go to www.occac.com/about-us/employment/

About Okanogan County:

Okanogan County is for the adventurous. Seventy percent of the land is state and federal forest with limitless recreation opportunities for fishing, hunting, hiking, biking, horseback riding, and more. You will find wide-open spaces teeming with wildlife, spectacular scenery from the Columbia River to the mountain peaks of the North Cascades, and family fun for all.

To learn more, go to www.okanogancounty.com and www.okanogancounty.org

JOB DESCRIPTION
FINANCIAL ASSISTANCE SERVICES PROJECT MANAGER

FULL-TIME NON-EXEMPT

The Financial Assistance Services Project Manager will design and implement financial assistance services to support low-income individuals, youth, veterans, and families in Okanogan County to become more financially stable. Two major programs need to be designed and implement before June 2023: the 2023 Washington's Working Family Tax Credit (WFTC) and Financial Literacy.

This is a grant-supported, full-time position with benefits currently funded through June 2023.

BACKGROUND

Twenty-five percent of Okanogan County residents fall at or below the poverty level. Tax credits are widely recognized as one of the nation's most powerful resources for lifting individuals and families out of poverty. Tax credits provide a refundable cashback credit to low-income working individuals and families when they prepare and file their annual income tax returns.

OCCAC is a contractor with the State of Washington to assist eligible clients in filing their taxes and taking advantage of the WFTC. The Financial Assistance Services Manager will create and implement services that connect low-income with free tax filing assistance while adhering to grant requirements and guidelines from the Washington State Department of Commerce. The Manager will be responsible for securing vendor support, contract management and compliance, client referral systems, budget, and managing all aspects of the program.

Additionally, OCCAC's strategic plan calls for establishing Financial Literacy courses to support clients in their efforts to become more financially stable and self-sufficient. The Financial Assistance Services Manager will work with and supervise an AmeriCorps Member in creating and implementing Financial Literacy courses. Courses could include banking, taxes, managing income, bargaining wages, financial emergency resources, creating an emergency savings fund, and creating SMART financial goals to help clients escape living under the poverty line. That work will include working with partners and stakeholders to design curriculum, developing the curriculum for a combination of online and in-person sessions, tracking client participation; and measuring program success.

The Program Director supervises this position.

DUTIES AND RESPONSIBILITIES

- Design and implement OCCAC's services to support clients in taking advantage of the Washington Working Family Tax Credit (WFTC).
- Manage a bidding and contract process to contract with local CPAs that specialize in income tax filing from various communities throughout Okanogan County.
- Research and find free-tax filing systems that will serve as a resource to clients.
- Develop referring relationships with community partners.
- Create and manage budgets.

- Work with the Washington State Department of Commerce and Washington State Department of Revenue contacts to implement this grant.
- Work with OCCAC's Communications and Outreach specialist to create a plan for communications and outreach to partner with other community social services agencies and promote the new WFTC services.
- Present information on OCCAC's Financial Assistance Services at various community and civic meetings.
- Supervise the AmeriCorps Member and adhere to all compliance requirements with the Chelan-Douglas Community Action Council.
- Work with the AmeriCorps member to establish Financial Literacy courses.
- Ensure Financial Literacy courses meet expectations for clients' outcomes.
- Establish systems with OCCAC case managers for internal referrals that will connect clients to financial assistance services.
- Help define program practices.
- Responsible for management of day-to-day operations of OCCAC's Financial Assistance Services.
- Complete any required training and attend all meetings as required to administer these services.
- Ensure clients have equal access to services and that services are delivered in a professional, ethical, and beneficial manner.
- Develop policies and procedures for Financial Assistance Services.
- Ensure that all aspects of OCCAC's new Financial Assistance Services adhere to and advance the Mission and Values of OCCAC.
- Ensure all programs align with standards, compliance, and guidelines.
- Ensure accuracy & quality of all program and fiscal reporting as well as file management.
- Manage to budget, staff, calendar, and facilities to support organizational finance and operation goals per program.
- Enforce rules and procedures for auditing, procurement, financial reporting, and legal compliance.
- Updates job knowledge by participating in educational opportunities; reading professional publications; maintaining personal networks; participating in professional organizations.
- May require regional travel.
- Other duties as assigned.

DESIRABLE QUALIFICATIONS

- Ability to work on and to lead a team.
- Customer service experience.
- Ability to prioritize and effectively delegate.
- Success in development and implementation of innovative programs.
- Strong human resource skills.
- Strong communication (verbal, written, and presentations).
- Outstanding organizational skills
- Proficient in Microsoft Office Suite and free filing systems like e-filing (IRS) or Turbo Tax.
- Undergraduate degree in related field or equivalent experience preferred.
- Minimum of three years' experience in
 - Working with and administering Financial Services.
 - Assisting individuals and families with diverse backgrounds, abilities, and challenges.

- Project management experience with both analysis of information and implementation of projects.
- Ability to perform daily duties to achieve expected outcomes and performance measures with minimal supervision.
- Display professional appearance.
- Ability to manage difficult situations in a discreet and professional manner.
- Willingness & ability to travel on agency business to various sites daily if needed, vehicle provided.
- Ability to obtain FBI Act 73, criminal history, Act 33, and Act 34 clearances.
- Valid Washington Auto Insurance coverage.
- Valid Washington State driver's license with acceptable driving record.

PHYSICAL DEMANDS ON THE JOB

While performing the duties of this job, the employee is constantly required to sit, talk, see, and hear. The employee is constantly required to stand, walk, or use hands to finger, handle, or feel objects, tools, standard keyboards and office equipment or controls and reach with hands and arms. Work is performed in a typical office environment, but occasionally will require work to be performed in a mobile office setting in the field. The employee will occasionally need to lift and/or move objects up to 40 pounds and seldom lift and/or move objects up to 20 pounds above their head. Though, limited physical effort is required. Noises in the work environment are usually moderate. There is limited exposure to physical risk to the employee.