



**ORANGE COUNTY UNITED WAY  
JOB DESCRIPTION**

<b>Job Title: Operations Specialist, OC Free Tax Prep</b>	<b>Reporting To: Senior Program Manager, United for Financial Security</b>
<b>Department: United for Financial Security</b>	<b>Position: Full-time/EXEMPT</b>

**Purpose of Position:**

Under the direction of the Senior Program Manager, the Operations Specialist will manage, assess, and report on all operational components of OC Free Tax Prep program, which provides free tax preparation for low to moderate income households, individuals 60+, those with limited English proficiency, and persons with disabilities.

**Key Duties and Responsibilities**

- Support the Senior Program Manager in ensuring adherence to grant requirements set by various funding sources, including but not limited to California Earned Income Tax Credit (CalEITC), Internal Revenue Services (IRS,) and the American Associate of Retired Persons (AARP) Foundation
- Work collaboratively with Program Specialist to fulfill required grant deliverables
- Track program data, including program details, objectives and results, and descriptive narratives on programmatic impact
- Coordinate with our IRS SPEC agent to receive regular Production; review for data tracking and analysis
- Complete all necessary reports for funders and internal monitoring
- Assist with the development of the OC Free Tax Prep program budget and monitor all revenue and expense
- Administer OC Free Tax Prep partner grants and awards
- Work with OC United Way internal departments to develop marketing, outreach, and communications collateral for the program; including by not limited to a monthly newsletter for continued volunteer and stakeholder engagement
- Work with Program Specialist to order and distribute marketing collateral to ensure it matches grant requirements
- Support the Senior Program Manager in oversight of contractors and vendors related to operations and marketing
- Manage site coordinator contracts, including processing timesheets and expense reporting
- Assist with grant submissions and renewals
- Other duties as assigned



### **Job Requirements/Technical Knowledge**

- Knowledge of issues affecting low to moderate-income households and communities in Orange County
- Knowledge of tax preparation and/or finances strongly preferred
- Ability to analyze statistical data from numerous sources for reporting purposes
- Ability to pass a Tax Law Certification exam upon hire (training provided)
- Ability to work independently and autonomously
- High level of attention to detail
- Interpersonal and communication skills
- Computer (Word, Excel, PowerPoint) and social media savvy
- Available to work evenings and weekends if required (typically in winter and spring)

### **Physical Demands**

Physical demands are representative of the requirements necessary for an employee to successfully perform the essential functions of this position. The employee is required to actively listen and communicate clearly. The employee is required to stand and publicly speak. The employee is required to walk, reach with arms and hands, climb, balance, twist, lean, move from one location to another, and to stoop, kneel, crouch or crawl. Vision abilities required by this job include close and far. Reliable transportation and a clean driving record are required as the employee may need to travel throughout Orange County to meet with participants and for other work engagements. Ability to operate a computer keyboard and mouse, and lift files and reports is required. Employee must be able to lift and carry 25 pounds.

### **Compensation**

Commensurate with experience, education, and market, \$66,560-\$70,000/year. Competitive benefits

### **Send Resumes To:**

[recruiting@unitedwayoc.org](mailto:recruiting@unitedwayoc.org)

Orange County United Way

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[www.unitedwayoc.org](http://www.unitedwayoc.org)