



## **VITA TAX SITE COORDINATOR**

**Position Description:** Site Coordinator (Part-Time - Temporary Contract Position – 30 maximum hours/week) December 2021 to April 2022

**Purpose:** Manage a Volunteer Income Tax Assistance (VITA) site that provides free tax return preparation assistance for income-qualifying, working families (current threshold is under \$57,000). This is an exciting, rewarding and challenging position and requires supervision of a free tax site during the tax filing season. The site coordinator is ultimately responsible for maintaining the quality procedures and processes required by the Internal Revenue Service, MakingChange, Inc. and the Maryland CASH Campaign to ensure quality, accuracy and proper filing of tax returns at the site.

MakingChange intends to open a physical site for the tax season. However, virtual assistance may be necessary for all or part of the tax services.

### **Responsibilities:**

#### **• SITE OPERATIONS**

- Ensure site is ready to open by the start of tax season with appropriate computers, printers, internet access, and supplies (and/or ensure systems are in place for virtual assistance).
- Oversee client and volunteer scheduling system to ensure an adequate number of volunteers are available for volume of appointments or other intake.
- Oversee proper operations of tax site, including the intake, preparation, quality review and electronic filing of tax returns.
- Provide support and technical assistance to volunteers.
- Assist with preparing individual (1040) tax returns for income-qualifying clients.
- Maintain accurate and complete files for all taxes completed.
- Oversee electronic filing and confirmation process for tax returns.
- Monitor statistics and volume and provide monthly updates to MakingChange Executive Director.

#### **• IRS COMPLIANCE AND QUALITY CONTROL**

- Responsible for maintaining compliance with IRS quality procedures and guidelines.
- Responsible for maintaining quality procedures, accuracy and security of tax files.

#### **• SUPERVISION AND RETENTION OF VOLUNTEERS**

- Recruit and support volunteers for the tax site.
- Create a training plan to ensure all volunteers receive adequate training and pass IRS certification test.
- Provide on-going training opportunities for volunteers throughout the tax season.
- Provide overall management and support to volunteers at the tax site.



- Focus on volunteer retention and satisfaction to ensure future volunteer availability and ongoing support for the tax site.
- Other duties as required.
- **OTHER ADMINISTRATIVE DUTIES**
  - Monitor all VITA-related voicemails and respond as appropriate (or manage volunteer to respond).
  - Prepare marketing materials for distribution and content for social media announcements.
  - Prepare updated information for MakingChange website for before, during and after tax season, including content of Frequently Asked Questions.
  - Prepare final reports and other information (e.g., final expenses, statistical report) to close out the tax season as required by funders or others.

**Qualifications:**

- Commitment to the mission of the VITA program, MakingChange, Inc. and the community it serves.
- Prior tax, legal, financial or similar training and/or experience required.
- Strong verbal skills to communicate effectively with staff, volunteers, consumers and community partners.
- Availability to work evenings and Saturdays.
- Must complete required IRS and MakingChange site coordinator training.
- Candidate must be able to successfully achieve IRS Advanced level preparer certification through an IRS-developed exam for volunteer tax preparers as a condition of employment.
- Organizational and leadership/management skills.
- Skilled at taking initiative, problem solving and working independently, including responding fully and timely to changes necessitated by Covid or other developments.
- Skilled at building interpersonal relationships to work effectively as part of a team and to manage volunteers.
- Proficient computer (at minimum, Word, Adobe and Excel) and web-related skills. Familiarity with posting items on social media not required but would be a plus.
- A commitment to providing excellent customer service.
- Ability to manage issues and crisis calmly and effectively.
- Friendly, dependable and flexible.

A background check will be conducted upon an offer of employment.