

Job Description

Job Title: United for Financial Empowerment - VITA Site Coordinator
Department: Community Impact
Reports To: Community Impact Officer
Status: Part Time
Updated: October 2018

Job Purpose:

UWSBC VITA Site Coordinator:

During the tax season from February 1, 2019 to April 16, 2019 the VITA/United for Financial Empowerment Initiative provides free income tax preparation for low-to-moderate income working families. The Site Coordinator directs the activities of IRS-certified volunteer tax preparer sites at the Carpinteria VITA tax site. The Site Coordinator is responsible for overseeing the daily procedures of their assigned VITA site including but not limited to quality review, volunteer outreach, scheduling, management and customer service.

Duties:

- Provides support to the general oversight and management of the VITA site.
- Attends trainings for volunteer tax preparers during the month of January.
- Assists with the opening and closing of sites. Ensures adequate supplies are available at all times at sites, including publications, posters, quality review forms, and intake sheets, and that volunteers receive Quality Alerts.
- Ensures that all volunteer tax preparers working at the site have been IRS trained and certified.
- Ensures that all site and volunteer forms are completed and submitted to Site Coordinator/Internship Instructor as required.
- Answers volunteer questions in a professional manner.
- Ensures that volunteers are performing in a professional manner both with accuracy and customer service.
- Checks all returns that are prepared by volunteers for completeness and accuracy.
- Supports the site activities to assure that volunteers and customers have a positive experience.
- Ensures that signed form 8879 and all required documentation is completed for each tax client.
- Completes all e-file for each tax return completed that day.
- Follow-up with rejected tax returns within 48 hour window of submission.
- Represents the program, agency and participant needs to funders, employers, and the community at large in a positive manner.
- Performs Quality Review for each tax return before submitted to the IRS.
- Provides quality customer service at all times to partners and clients.
- Please note as a paid employee (\$500 or more) of VITA you are not protected under the IRS Volunteer Protection Act.

Requirements:

At least 2 years experience preparing and filing taxes
Must pass the Advanced VITA tax preparer exam before site opens
Exceptional Organizational Skills

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills and/or abilities required. Reasonable accommodations may be made to enable individuals with disabilities to perform the described functions.

Language Skills

Ability to communicate clearly. Spanish is desired.

Computer Skills

Ability to use word processing, spreadsheet, and database applications. Ability to learn various software programs.

Certificates, Licenses, and Registrations

Valid driver's license preferred.

Physical Demands and Work Environment

The physical demands and work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to talk; hear; sit; and use hands to finger, handle or feel. The employee is frequently required to use one or both hands repetitively; grasp simply and lightly; and grasp with one hand only. The employee is occasionally required to stand; walk; use both hands repetitively; grasp firmly with both hands; push and/or pull; use both hands with fine dexterity; reach overhead with hands and arms; climb or balance; use stairs; stoop, kneel, bend, or crouch; lift and/or move up to 25 pounds; and walk on uneven ground and between buildings. Normal 20/20 vision ability (with corrective lenses, if needed) is required by this position. The noise level in the work environment is usually somewhat quiet.

Organizational Background

United Way of Santa Barbara County (UWSBC) has the unique and positive vision that "in our community, everyone has a hopeful future." Since 1923, UWSBC has served Santa Barbara County community through funding, volunteer development, and by utilizing its own unique initiatives and partnerships that involve dozens of local non-profit and public sector agencies. UWSBC's local community driven **Power of Partnership™** priorities help children, families & seniors with a focus on Education, Income and Health.

General: This description contains the essential functions necessary to evaluate the position. It is not intended and should not be used as an exhaustive list of all responsibilities, skills or efforts.

Employee	Date	Human Resources Department	Date
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Department Manager	Date	CEO	Date
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