

VITA Site Coordinator

Full-time Position

Background Experience:

Advanced Tax Law Certifications

Quality Reviewer

Social Services/Cultural Sensitivity

Multiple Tax Sites Coordinator experience preferred

Bilingual in Spanish/English preferred

Accounting experience preferred

Roles and responsibilities-

The Program Coordinator is/will be responsible for the following:

- Oversee two (2) VITA sites and proposed mobile program.
- Completes the Site Coordinator Training including reviewing Publication 1084, Site Coordinator's Handbook, and Publication 5088.
- Conducts outreach in order to reach underserved populations.
- Conducts volunteer outreach, assists all volunteers with the CRC volunteers process (live scan etc.), maintains the volunteers schedule and provides volunteer with VITA orientation (online training access, printed material, directions, schedule, login, etc.)
- Maintain an updated list of volunteers using the Volunteer Assistance Summary Report (SPEC Form 13206). Ensures all volunteers complete timesheets and provides proof of hours such as school volunteer forms and letters of recommendation as needed.
- Ensure all Quality Site requirements are met as per Site coordinators handbook. Including ensuring all volunteers are certified prior to starting at the site in the following: Volunteer Standards of Conduct (VSC), Tax Law, and Intake/Interview and Quality Review Training per their volunteer position requirements.
- Provides continued training to volunteers. Oversee all volunteers are trained and complete returns within their certification level and within VITA scope. Keeps individual volunteer folders with live scan, Form 13615--The Volunteer Standards of Conduct Agreement --VITA/TCE Programs, tax law certificates etc. and a running list of contact information and certifications of each volunteer.
- Ensures Security, Privacy and Confidentiality guidelines outlined in Publication 4299 are followed such as keeping the files and data secured in locked cabinets.
- Ensure VITA program grant requirements and objectives are fulfilled and tracked electronically. Reports program progress and expenses monthly to the Director of Programs and compliance meetings.
- Attends tax preparation related meetings and trainings.
- Completes VITA grant and United Way reports.
- Maintains communication with Coalition, VITA grant and other community partners.
- Orders office supplies and ensures reference materials are available to volunteers including tax alerts, publications (Publication 4012, Volunteer Resource Guide, Publication 17, Your Federal Income Tax for Individuals and others).
- Provides resources to volunteers via email, training binders, bulletin boards and resource dedicated areas.
- Ensures any required signage is displayed including the Title VI of the Civil Rights Act of 1964.

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- Ensure the correct Site Identification Number (SIDN) and Electronic Filing Identification Number (EFIN) is used, creates master return templates and assigns volunteer usernames in the taxwise software.
- Ensures quality service and adherence to guidelines by checking tax return files for completeness and proper documentation (internal audit).
- Assists with troubleshooting return questions and issues.
- Communicate with IRS/VITA hotline as needed.
- Conducts client follow-ups with return issue and pending documents for return completion.
- Serve as a Tax Preparer and Quality Reviewer only when needed.
- Locks and secures all tax files at the end of shift.
- Updates Program Specialist on site operations progress, challenges and supply needs.

Oversees the Greeter and Screener duties:

- Scheduling appointments
- Assist clients' in completing surveys and IRS intake documents.
- Attends to walk-ins by answering questions.
- Prescreen walk-ins and phone calls.

Other duties as assigned per Program Specialist or Director of Programs.