



United Way
of Northern California

VITA Site Coordinator

Reporting To: Community Impact Director

Position: Part Time, Contract Position

Term Limit: January 2, 2018 through April 30, 2018

Through the Volunteer Income Tax Assistance (VITA) Program, United Way of Northern California, in partnership with the Internal Revenue Service (IRS) and Redding Bank of Commerce, is offering free tax preparation services to low and moderate income taxpayers throughout Shasta County. This program is part of United Way of Northern California's financial literacy strategy, which assists residents in becoming financially independent by focusing on education and services that build financial stability.

The VITA Site Coordinator will work closely with the Community Impact Director to ensure that the VITA Tax Services Program is available to all low and moderate income residents of Shasta County.

Anticipated pay is \$20/hour, with an expected workload of maximum 20 hours per week. Hours will be coordinated through, and approved by, the Community Impact Director.

Principal Job Responsibilities include:

- Becomes/is an advanced tax preparer
- Recruits Tax Preparation Volunteers
- Performs all responsibilities that will ensure the safe and efficient operation of the VITA sites, including maintaining privacy and confidentiality of taxpayer information
- Coordinates with Community Impact Director on all aspects of site management, IRS and program requirements, and e-file administration
- Assists with outreach to Shasta County residents, students and workers, increasing awareness about the program
- Manages VITA site operations during the tax season and ensure sites are open as scheduled and adequately staffed to meet the demand of appointments
- Ensures that all volunteers working at the site have completed the required certification
- Recognizes and appreciates all volunteers
- Ensures that all volunteers working at the site have the proper tools and information to accurately file tax returns
- E-Filing/Transmission and Quality Review:
 - Acts as the e-file administrator
 - Reviews tax returns to be e-filed to ensure quality and completeness
 - E-files returns within 48 hours of preparation
 - Maintains files for accepted returns and paper returns

- Reviews, rejects, and informs tax filer within 24 hours. Take necessary action to fix filing problem and resubmits the tax return
- Attends relevant IRS and United Way meetings as directed by Community Impact Director
- Assists at United Way free tax preparation events
- Completes additional related tasks when requested
- Represents the work of United Way professionally and responsibly

Key Competencies Required: The ideal Site Coordinator will have the following education and skill requirements:

- Prior VITA experience
- Associate or Bachelor degree in accounting, tax, or related-field preferred
- Required to pass (at minimum) the online IRS certifications in Basic, Advanced, and Health Savings Account once hired and prior to preparing tax returns
- Must be available to work flexible weekday hours
- Ability to manage and coordinate an all-volunteer staff
- Ability to work independently in a fast-paced setting
- Strong analytical and problem-solving skills
- Ability to work with Microsoft Office products, especially Microsoft Excel
- Bilingual/multilingual a plus

Training:

Classroom training or self-study through IRS Link and Learn and a passing score of 80% or more on the tax law and standards of conduct exams at the Advance level. A special IRS Site Coordinator training is provided to the coordinators by IRS-SPEC or United Way representatives. This course covers all the quality site requirements and other administrative items necessary to effectively operate a VITA site.

Physical Demands:

Physical demands are representative of the requirements necessary for an employee to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The employee is required to talk and hear. The employee is often required to sit and use their hands and fingers to handle or feel. The employee is required to stand, walk, and reach with arms and hands. Vision abilities include close vision.

United Way of Northern California is an Equal Opportunity Employer.

Send Resumes To:

nmosqueda@norcalunitedway.org

12/13/17