



Position: Assistant Site Manager

December 2019 - May 2020



United Way
of Greater Philadelphia
and Southern New Jersey

Reports to: Site Manager & Manager of Operations, Campaign for Working Families, Inc.

Program: The Campaign for Working Families, Inc. (CWF) facilitates expanded income security to low and moderate wage earners in the Philadelphia and Southern New Jersey regions by increasing their access to the Earned Income Tax Credit (EITC) and other federal credits, low cost financial services and products and public benefits. During the tax season, the Campaign runs a number of VITA (Volunteer Income Tax Assistance) tax sites throughout Philadelphia and Southern New Jersey, managed by paid contractors and supported by volunteer tax preparers that provide free tax preparation services for low and moderate income families and individuals.

Purpose of Position: Supports the Site Manager in the coordination, organization and supervision for all aspects of a CWF tax site during the tax filing season.

Length of Appointment: Part-Time Employee (up to 29 hours per week) positions from Mid-January to May 1, 2020. Training occurs December 2019 through January 2020. Candidates must be available for trainings and to work Saturdays and evenings as required during the tax season.

Responsibilities:

CUSTOMER SERVICE

- Create a welcoming atmosphere for tax customers and volunteers; responsible for all aspects of customer service
- Provide respectful and comfortable environment for volunteers and clients

SITE OPERATIONS

- Support Site Manager/Coordinator in the management and operation of the tax site.
- Obtain proficiency in the tax processing software used for tax preparation at the tax sites.
- Support the site manager in the tax site set up process in the beginning of the tax season, including designing client flow, physical space and logistics Work with the site manager to ensure the following:
 - Accurate customer files are maintained
 - Electronic filing process and confirmation process is maintained as follows:
 - Tax returns are transmitted in a timely manner
 - Acceptance of returns are verified via Acknowledgement reports
 - Rejected returns are followed up in a timely manner
 - Timely preparation and submission of reports required by the CWF
 - Site is represented for all weekly conference calls and meetings required by Campaign for Working Families, Inc.
 - Manage or perform any other administrative duties as requested by the site manager.

- Support the timely closedown of the tax site as requested by the Campaign and ensure that all final instructions regarding the organization of tax forms and files are adhered to and that tax forms and files are available for delivery/pick up as scheduled.

IRS COMPLIANCE AND QUALITY CONTROL

- Responsible for working with Site Manager/Coordinator in maintaining compliance with IRS privacy, security and quality guidelines and procedures. Support IRS Shopping and Site reviews as required.

SUPERVISION AND RETENTION OF VOLUNTEERS

- Support all volunteers by providing tax assistance as required at the site
- Proactively manage volunteers in terms of scheduling and training at the site beyond tax preparation to include other aspects of the tax site operations (quality control; filing; screening customers etc.)

Qualifications:

- Commitment to the mission of the Campaign for Working Families and the individuals and families we serve
- Associate or Bachelor's degree in related field or previous experience with VITA or computer tax preparation program.
- Basic tax knowledge (Form 1040, 1040A and 1040EZ) and experience with tax software while not required is a plus. Candidates must possess the desire and ability to learn the appropriate tax law and processing software and obtain IRS tax certifications at the Advanced level.
- Ability to work with the public, volunteers, and partners in a helpful and supportive manner.
- Daily access to e-mail.
- Computer literacy including Microsoft Excel spreadsheets
- Willingness to work in hectic, ever-changing environment with good humor.
- High energy, organized, professional and outgoing personality are traits required for success in this position.

How to Apply: Please send resume and cover letter to: mcouch@cwfp Philly.org