



Position: Tax Site Manager

December 2021 - May 2022

Reports to: Director 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, supported by volunteer tax preparers that provide free tax preparation services for low and moderate income families and individuals.

Purpose of Position: Provide coordination, organization and supervision for all aspects of a Campaign tax site during the tax filing season. The Site Manager is ultimately responsible for maintaining the quality procedures and processes required by the IRS and Campaign to ensure the overall accuracy of tax returns prepared and e-filed at the site.

Length of Appointment: Part-Time, Seasonal Employee (up to 29 hours per week). December 2021 through January 2022. Candidates must be available for trainings, 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.
- **SITE OPERATIONS**
 - Ensure smooth operations of tax site.
 - Work with site liaison and/or site team regarding set up and logistics of the tax site necessary to accommodate the following:
 - Intake, Screening, Tax Preparation , Designated Quality Review & Return Close Out (forms and signatures)
 - Self-certify to attain IRS tax certification at the Advanced level for volunteer tax preparation.
 - Attain software and tax processing knowledge necessary to support volunteer tax preparers.
 - Maintain electronic filing and confirmation process for tax returns prepared at the site.
 - Transmit tax returns on a timely basis.
 - Verify acceptance of returns via Acknowledgement reports within in 48 hours
 - Manage rejected returns in a timely manner.

- Maintain accurate and complete customer files for all taxes completed.
- Manage closedown of the tax site and organization of tax forms and preparation of customer files and data as required by the Campaign.
- Manage Assistant Site Management team such that responsibilities are delegated to maximize support/coverage at the tax site.
- Maintain effective communication with volunteers and the Campaign.
- **IRS COMPLIANCE AND QUALITY CONTROL**
 - Responsible for IRS compliance regarding quality procedures, reviews and site visits.
 - Support all volunteers by providing tax assistance as required at the site
 - Record volunteers hours in volunteerhub online software portal daily
 - Cross train volunteers to cover all aspects of the tax preparation process beyond tax preparation (quality control; filing; screening customers etc).
 - Focus on volunteer retention and satisfaction to ensure future volunteer availability and ongoing support at the tax site.
 - Work to ensure that each volunteer's opportunity to support the tax site is optimized.

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 software.
- Ability to obtain IRS volunteer tax certification at the ADVANCED or higher level.
- Organizational and leadership/management skills including previous supervisory experience.
- 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.
- Must have daily access to e-mail and a PC either at home or professionally.
- Computer literacy including Microsoft Office/Excel required; database experience is a plus.
- Willingness to work in hectic, ever-changing environment with good humor.
- High energy, organized, professional, personality required for success in this position.