

SaveFirst Site Coordinator Position Description

Position: Tax Site Coordinator, Part-time, Temporary for 10- 30 hours per week; will work to accommodate schedule when possible

Position Timeline: Training in December or early January (amount of training depends on previous experience); Site Coordinator responsibilities through mid-March or mid-April depending on site

Description:

SaveFirst is an initiative that provides free tax preparation to low-income, working families. This program is provided through the IRS's Volunteer Income Tax Assistance (VITA) for qualified individuals and is a program of Impact America.

Every tax season, America's hardest-working families rely on their tax refund to support household expenses. Unfortunately, they face exorbitant, negligent, and sometimes fraudulent preparers that cost our communities millions in fees. SaveFirst provides free tax preparation services and meaningful opportunities for savings.

We are seeking a customer-service driven Tax Site Coordinator to assist in managing volunteers and site operations at tax sites in Auburn, Birmingham, Florence, Huntsville, Montgomery, and Tuscaloosa, Alabama. The Tax Site Coordinator will complete required training, supervise volunteers, and review and e-file returns prepared at the site. They will also prepare taxes when volunteers are not available.

Training:

- Successfully complete the tax law and site coordinator training during specified dates in Winter of 2022 or early January 2023; training time is paid

Responsibilities:

- Supervise volunteers (mostly young adults), interns, quality reviewers for the tax preparation location
- Adhere to all IRS and SaveFirst regulations for site operations, including scope of tax returns, privacy of information and site procedures.
- Maintain client sign-in sheets and e-file logs.
- Maintain volunteer sign-in sheets and name badges.
- Conduct Quality Reviews of tax returns.
- Assist in preparation of tax returns as needed
- E-file tax returns at the end of shift and correct rejects as needed.
- Maintain a list of taxpayer resources.
- Setup and take down of tax site tables, equipment, supplies, etc. as needed
- Maintain communication with Impact America/SaveFirst staff about site operations

Qualifications

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

- Relevant experience or education preferred, but not required (e.g. prior VITA or other tax preparation experience or classes in accounting, tax, or related-field). Training will be provided to all site coordinators, with additional training available to those without relevant experience.
- Required to pass (at minimum) the online IRS certifications in Advanced, Health Savings Account, Volunteer Standards of Conduct, Intake and Interview, and Site Coordinator tests with 80% or higher; training time is provided and paid once hired
- Must commit to regular schedule of hours for a minimum of 8 weeks from late January to tax filing deadline, including evenings or Saturdays (schedule will vary by location)
- Ability to provide high-quality customer service experience to the public
- Ability to manage and coordinate an all-volunteer staff
- Ability to work independently in a fast-paced setting
- Strong analytical and problem-solving skills
- Computer literacy required; training will be provided for specific tax preparation software

Physical Requirements/Essential Functions:

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

- Must be able to sit for long periods of time and repeat the same movements, such as typing, with or without assistance.
- Must have the ability to understand the speech of another person, verbally communicate clearly so listeners can understand, see details of objects that are less than a few feet away, and follow both verbal and written instructions.
- Ability to understand the speech of another person, verbally communicate clearly so listeners can understand.
- Large portions of time spent looking directly at a computer
- Work outside of normal office hours may be required during certain times of year (i.e. some evenings and Saturdays during January, February, and early March) to meet program demand.

Job Type: Office Environment, Non-Exempt, Part-time (10-30 hours per week), Temporary (Starts approx. Dec. 2022 and ends approx. April 2023), no benefits, business mileage reimbursement at IRS rate, as needed in position.

Rate of Pay: \$20/hour

Reports to: Impact America State Director

Supervises: SaveFirst Volunteers

Location: Positions available in Auburn, Birmingham, Dothan, Florence, Montgomery, & Tuscaloosa, AL

Impact America/PARTNER is an equal opportunity employer.

Please send a statement of interest and resume to Caroline Janeway, cjaneway@impactamerica.com.