

## VITA - Tax Program Coordinator

### About United Way of Greater Mercer County (UWGMC):

We connect people with resources propelling individuals and families to reach their fullest potential creating a thriving community. In order to achieve our mission, we invest in programs, community partnerships, and volunteer engagement in youth and family success, economic vitality and health and wellness. Our vision is a vibrant and inclusive greater Mercer County whereby all can thrive.

### Position Overview:

The Tax Program Coordinator will oversee the day-to-day operations of the Mercer County's Volunteer Income Tax Assistance program (VITA) during tax season. The Tax Program Coordinator will work in conjunction with the Director of Economic Mobility Initiatives at United Way of Greater Mercer County to ensure programmatic goals and grant deliverables are met.

UWGMC's goal is to assist at least 2,000 taxpayers in preparing their returns in a safe, culturally and linguistically appropriate manner.

The Tax Program Coordinator position is Part-Time/Seasonal, grant funded December through May. Compensation/Salary is \$31 per hour.

### Major Responsibilities:

#### Site Coordination Management:

- Overall technical management of all VITA (Volunteer Income Tax Assistance program) tax sites in the Mercer CASH Campaign during tax season
- Accountable to IRS, IRS Grants office and Director of Economic Mobility Initiatives on all issues concerning the VITA program
- Supervision of virtual and in-person volunteer tax preparers
- Provide requested information for the grant management and data collection
- Oversight of opening and closing the tax sites on each operating day
- Manage any taxpayer issues along with site coordinator(s)
- Liaison with the tax software and IRS
- Ensure all equipment is in working condition and troubleshoot as needed
- Conduct all mandatory site coordinator meetings
- Develop and distribute site coordinator's weekly email which includes IRS Tax Alerts, etc.
- Complete, review, and transmit tax returns when needed
- Make sure surveys are collected at tax program sites
- Providing customer service to clients, as needed

### Volunteer Management:

- Manage volunteer management system (making sure volunteers are entering hours into volunteer management software)
- In partnership with the Director of Economic Mobility Initiatives recruit and vet tax preparer volunteers
- Spearhead volunteer deployment to specific tax sites and at designated times to meet demand
- Ensure all volunteers adhere to the Volunteer Standard of Conduct and Quality Site Requirements along with site coordinators
- Sign each Volunteer Standards of Conduct Agreement (Form 13615), acknowledging that you have verified the required certifications and proper identification for all volunteers prior to allowing them to work at the VITA/TCE site.
- Coordinate training logistics
- Regularly communicate with volunteers and site coordinators to provide updates, announcements and to problem-solve.
- Support tax site coordinators to ensure they have appropriate materials and volunteers

### IRS Training Requirements:

- Complete Tax Law training, electronic filing software training, and the submission and signing of the Confidentiality Statement
- Successfully pass Tax Law tests (Advance, HSA; Link and Learn; [www.irs.gov](http://www.irs.gov))
- Complete the IRS Volunteer Standards of Conducts, Intake and Interview training and testing
- Complete SPEC Site Coordinator Training
- Sign the Volunteer Standards of Conduct Agreement (Form-13615)

### **Requirements:**

- Enroller Agent or a CPA license preferred
- Experience completing tax returns in a professional manner required
- Experience with employee and volunteer management required
- Must have flexibility with scheduling, including evenings, weekends, and early mornings
- Must have a vehicle, a valid driver's license, and be comfortable driving, parking, and conducting outreach in urban areas
- Must be able to lift 30 lbs. of equipment in and out of a car
- Provide daily and weekly updates of progress through phone calls, emails or face to face meetings

### **Skills and Experience:**

- Strong understanding of tax preparation processes and IRS regulations
- Team oriented personality; willingness to help where needed
- Attention to detail; ability to multi-task; proactive problem solver

- Ability to use and troubleshoot technology including computers, printers, hotspots, internet, and web-based platforms
- Strong written and verbal communication skills, including the ability to make presentations and supervise large, diverse group of volunteers
- Commitment to economic empowerment of low-income and underserved populations
- Strong project management experience
- Familiarity with TaxSlayer software is a plus

#### **Working Environment:**

- Standard, professional office environment
- Some evening and weekend work hours will be required
- Strong ability to work independently
- Superb ability to operate effectively in a fast-paced work environment

#### **Commitment to Diversity and Inclusivity:**

United Way of Greater Mercer County is committed to building a diverse organization and a climate of inclusivity. We strongly encourage applications from candidates who can demonstrate that they can contribute to this goal.

#### **Equal Opportunity Employer:**

United Way of Greater Mercer County is an Equal Opportunity Employer.

#### **How to Apply:**

Interested candidates should send a cover letter and resume to:

Jessica Figueroa, Director of Economic Mobility Initiatives  
Email: [Jessica.Figueroa@uwgmc.org](mailto:Jessica.Figueroa@uwgmc.org)

Write “**VITA Tax Program Coordinator**” in subject line.