

LEO Inc. VITA Site Coordinator

Summary

LEO's VITA Program provides free tax preparation services to low and moderate income taxpayers in LEO's service area through the Internal Revenue Service's (IRS) Volunteer Income Tax Assistance (VITA) Program. The role of the Site Coordinator is to manage all aspects of VITA programming including: IRS compliance, volunteer recruitment, and client screening scheduling. This position is part-time, seasonal, operating December 2020 through mid-April 2021. Hours will vary weekly depending on workflow and scheduling.

Key Duties and Responsibilities

- Coordinate with the IRS and the state-wide community action agency association program lead on all aspects of program requirements, compliance and e-file administration.
- Recruit volunteers, maintain volunteer records and ensure volunteers are trained and complete the required certification to accurately file tax returns.
- Oversee tax appointment screenings and services, develop a schedule that ensures sites are adequately staffed to meet the demand of client appointments.
- Act as the e-file administrator, file tax returns with the IRS within 24-hours, resolve rejected returns in a timely manner, and conduct a quality review on each return prepared by volunteer tax preparers.
- Provide tax site administration, including the collection or required IRS forms, ensure IRS Code of Conduct and Confidentiality Regulations are practiced and all required records and documentation is properly maintained.
- Monitors data and report deadlines and follows up with relevant parties to ensure compliance.
- Assist with outreach and marketing activities to raise awareness about the program and to identify eligible community residents.
- Attends relevant IRS and state-wide association meetings as directed by Chief Program Officer.
- Completes additional related tasks when requested.

Qualifications

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

- Strong project management skills with timely and consistent attention to follow up.
- Effective problem solver and decision maker.
- Excellent oral and written communication skills.
- Ability to manage and coordinate an all-volunteer staff.

- Strong customer service skills.
- Ability to lead within a team environment; ability to multi-task, self-motivated and takes initiative.
- Ability to work under pressure in a fast-paced environment.
- Bilingual Spanish/English preferred.
- Relevant experience with tax preparation and/or book-keeping.
- Required to pass (at minimum) online IRS certifications in Basic, Advanced, and Health Savings Account once hired and prior to teaching.
- Must be able to work a non-standard work schedule including as needed evenings and weekends.
- Complete all training requirements.

Training

Classroom training or self-study through IRS Link and Learn and must achieve a passing score of 80% or more on the tax law and standards of conduct exams at the advanced level. The 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.

Schedule

Must be available to work flexible hours, evenings and Saturdays, every week throughout tax season. Meetings, trainings, and gatherings prior to tax season will be required, and most likely occur during the workday.

I understand my job responsibilities and will perform them to the best of my ability.

Employee Signature

Date

Employee (Print Name)

Revised January 8, 2020