

## **VITA Program Assistant**

### **Organizational Overview**

El Centro Inc. is a non-profit 501(c)(3) whose mission is to provide culturally competent financial literacy, business training, and coaching in Spanish to Latinx individuals and entrepreneurs in South Louisiana.

### **Position Overview**

El Centro is seeking a bilingual (Spanish/English speaking), well-organized and independent leader to serve as assistant site coordinator for Free Tax Preparation/VITA (Volunteer Income Tax Assistance) tax site. The Volunteer Income Tax Assistance (VITA) program offers free federal and state income tax preparation for qualifying Latinx families and individuals from January - April. With the guidance of the VITA Site Coordinator, this individual will assist in the management of a Free Tax Preparation/VITA site in Orleans and Jefferson parish with a goal of increasing participation and providing excellent quality service.

The Assistant Site Coordinator will help manage the virtual and physical tax sites for the 2020 tax season. The assistant coordinator will help organize, recruit, schedule and manage volunteer tax preparers ensuring all volunteers have obtained the necessary certifications. The Assistant Coordinator will assist in providing regular reports to El Centro leadership. This individual will complete the Volunteer Standards of Conduct, Intake/Interview/Quality Review, Site Coordinator, advanced IRS Tax Law certifications and conduct Quality Reviews of returns filed by fellow volunteers. They will assist with tax preparation when necessary. Comfort and experience working with computers and web-based reporting programs is required.

This is a grant funded volunteer position with a stipend and mileage reimbursement.

### **Support Role in the Following Key Duties and Responsibilities**

- Manage all aspects of the tax site to ensure superior quality and service to clients
- Recruit and assist in the training of volunteer tax preparers for the tax site
- Manage all volunteers and coordinate scheduling
- Ensure adherence to UWSELA and IRS policies, procedures, standards of operations and guidelines.
- Ensure compliance with tax laws when preparing federal and state income tax returns
- Ensure compliance with IRS privacy and confidentiality policies
- Ensure all IRS and UWSELA forms are completed
- Responsible for the set-up, operation, and maintenance of laptops, wireless equipment, and printers
- Assist with marketing and publicity for VITA Latinx program
- Collect volunteer hours and feedback throughout the tax season
- Collect Customer Satisfaction Surveys throughout the season
- Assist with annual United Way/Entergy Super Tax Day and El Centro mobile tax preparation events.
- Assists with outreach to Greater New Orleans residents, students, and workers, increasing awareness about the program
- Manage VITA site operations during the tax season and ensure sites are open as scheduled and adequately staffed to meet the demand of appointments
- Ensure that all volunteers working at the site have completed the required certification and recognize and appreciate volunteers
- Ensure that all volunteers working at the site have the proper tools and information to *accurately* file tax returns
- Attends relevant IRS and United Way meetings with the Site Coordinator

- Complete additional related tasks when requested by the Site Coordinator and Executive Director
- Represent El Centro ethically, professionally, and responsibly

**Additional Responsibilities:**

- Verify the identity of all volunteers via photo identification prior to the volunteer working at a VITA/TCE site.
- Supervise volunteers working at the site.
- Develop a process to explain to volunteers the logistics and systems used at your site.
- Develop and maintain schedules for all volunteers to ensure there is adequate coverage, supplies, and equipment at your site.
- Must complete the Volunteer Standard of Conduct exam and Intake/Interview & Quality Review
- Complete Basic and/or Advanced Level Tax training through the IRS Link & Learn website (under United Way of Southeast Louisiana guidance)
- Participate monthly in the SPEC trainings for IRS as needed

**Qualifications**

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

- Bi-lingual (Spanish/English)
- Associate or bachelor’s degree in accounting, tax, or related-field preferred
- A general understanding of income tax law is helpful, paid IRS-sponsored training will be provided
- Ability to work well in a fast-paced environment, and display a supportive and professional disposition with diverse populations
- Reliable transportation to drive to the tax site and to transport all necessary equipment as needed Experience and comfort serving clients and managing a team from diverse backgrounds
- Comfort with technology (computers, software, internet platforms, etc) and to use Excel
- Strong Customer Service, Analytical and Problem-Solving Skills, thrives under pressure

**Stipend:** \$8.00 to \$10.00 per hour; up to a maximum of 15 hours per week (commensurate with experience)

**Mileage Reimbursement:** .55 cents per mile for travel from office to mobile sites

**Training:** Classroom training or self-study through IRS Link and Learn and a passing score of 80% or more on the tax law and standards of conduct exams at the Advance level. A special IRS Assistant Site Coordinator training is provided to the coordinators by IRS-SPEC or United Way representatives. This course covers all the quality site requirements and other administrative items necessary to effectively operate the VITA Latinx site.

**Physical Demands:** This position does not require any heavy lifting, but occasionally might require moving up to 25 pounds of supplies and equipment

**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.

**Competencies:** To perform the job successfully, an individual should demonstrate the following competencies:

- Mastery of Spanish language - be an effective communicator, both written and oral,
- Self-motivated, strong organizational skills, detail-oriented, ability to prioritize, multi-task and meet deadlines.
- Enthusiasm for the mission of El Centro and the individuals and entrepreneurs we serve.

**Supervision:** Report to Site Coordinator and Executive Director

**Interested? Please complete the VITA Recruitment Application Form:** <https://forms.gle/P8i2VWV3kCeBjhfy7>

