



Hispanic Unity of Florida Job Description

Job Title: VITA Site Coordinator
Department: Economic Development
Reports To: VITA Program Manager
Classification: Non-Exempt, Seasonal
Work Location: In-Office
Date Released: _____

CHANGE LIVES AND MAKE A DIFFERENCE!

At Hispanic Unity of Florida (HUF), we change lives every single day – in small and big ways. If you want to join an exceptional organization that works tirelessly to ensure that everyone is empowered to live their American dream, please continue reading.

It is imperative that all applicants share HUF's values as it serves as the foundation for how we treat each other, our clients, our funders, and everyone we come into contact with. Those values include, but are not limited to: *Integrity, transparency, respect, dignity, accountability, diversity, and cultural awareness, commitment to excellence, collaboration and teamwork.*

Job Summary:

The Site Coordinator (SC) plays a critical role in achieving the overall desired program goals. The performance accountability standards for this position require that the SC properly supervises program staff, volunteers, and program operations resources in compliance with all IRS requirements. Paramount to this effort is that the program assists clients in identifying and accessing all eligible tax credits to maximize their refunds and the dollars are brought back to the community.

Supervisory Responsibilities:

- The goal of the 2024 VITA program is to have 4,500 error free returns prepared and submitted. VITA sites must maintain an e-file rejection rate of less than 9%.
- The SC supervises other seasonal staff and volunteers at each site. Seasonal staff includes Quality Reviewers, Tax Preparers, and Greeters/Intake Specialists.
- The SC will primarily be responsible for ensuring the safe and secure handling of clients' information and documents while providing a positive client experience.

Essential Duties:

- Facilitates the efficient and effective delivery of tax preparation services for clients.
- Ensure VITA site's compliance with all 10 IRS Quality Site Requirements (QSRs). Ensure that all Certified Volunteer Tax Preparers are aware of the Quality Review procedures and Quality Alerts issued by the IRS.
- Ensure that proper volunteer coverage is scheduled, and that supplies, publications and equipment are maintained and available at each VITA site.
- Provide guidance, support and leadership to the site staff and volunteers in the development of team communication and cohesiveness while promoting Hispanic Unity's core values. Receive a minimum of 90% volunteer satisfaction rating as the Site Coordinator.
- Cultivate existing relationships and develop new relationships with the key contacts at our site partner organizations.
- Maintain open lines of communication and work collaboratively with the VITA Program Manager, the VITA Program Assistant, and the Outreach Coordinator.
- Conduct a minimum of three meetings during the tax season with VITA staff/volunteers to improve the site operations and provide mentorship.
- Assigned site(s) must receive a minimum 90% client satisfaction rating with service delivery.
- For the Virtual VITA model SC ensures that all tickets are being worked on and transmits completed tax returns.

Tasks managing tickets include:

- Assigning tickets to tax preparers, and/or quality reviewers.
- Checking for clients who are stalled in the questionnaire process, and assigning those tickets.
- Making sure VITA team members are making progress on returns.
- Ensuring client questions are answered promptly.

Tasks submitting the return include:

- Transmitting signed returns in TaxSlayer® in a timely manner and in accordance with IRS guidelines.
- Checking on whether the return was accepted or rejected.
- Addressing rejected returns.

Tasks related to customer service include:

- Answer questions or concerns the taxpayer may have concerning the tax law or Virtual VITA process.

Qualifications and Job Requirements:

- **All candidates must pass with a level 2 background check.**
- Complete current tax law training sessions, including the use of the TaxSlayer® electronic filing software, and pass all certification exams required by the IRS (e.g. Standards of conduct, Intake/Interview and Quality Review, Advanced, and Site Coordinator) prior to the start of the tax season.
- Attend all mandatory staff training and staff meetings (whether in person or virtual).

- Timely submit all periodic reports required by funders and/or program management.
- Manage program resources provided by HUF in an efficient and fiscally responsible manner.
- The candidate must be fluent in English (written and spoken) and possess strong communication, organizational and problem-solving skills, attention to details, and possess the ability to prioritize multiple tasks.
- Bilingual skills are a plus (English/Spanish, English/Creole, English/Portuguese).
- Demonstrated ability to work effectively with diverse families and communities.
- Ability to work effectively in a team environment, positive attitude and handles sensitive and confidential information with maximum discretion.
- Be available to work flexible hours, in order to meet the program expectations. (Some weekends and evenings)
- Proficiency in Word, Excel, Outlook, PowerPoint and Tax Prep Software
- Ability to travel independently and possesses a valid Florida driver's license and insurance. (Proof Required).
- Responsible for handling various administrative duties as required by the department.

Education and Experience:

- The ideal candidate will have a bachelor's degree and/or a minimum of 2 years of tax/VITA related experience; or comparable experience.

Working Environment:

- A workspace will be provided/assigned for the individual to perform the duties in a confidential setting. Site Coordinator must exercise precautions to ensure the safe and secure handling of clients' information.

Physical Requirements:

- Prolonged periods sitting at a desk and working on a computer.
- Must be able to lift up to 15 pounds at times.

Hispanic Unity of Florida is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the employer will provide reasonable accommodations to qualified individuals with disabilities and encourage both prospective and current employees to discuss potential accommodations with the employer.

I have read my job description and understand my responsibilities.

Employee's Signature _____ Date: _____

Supervisor's Signature _____ Date: _____

Title: _____

This job description does not alter your “at-will” status. It is not an employee agreement or contract. Management has the right to alter this job description at any time with or without notice. Employee understands that other tasks or duties may be added or assigned from time to time, at the discretion of the administration.