



## Site Coordinator Description

### CA\$H Coalition/VITA Overview:

The Onondaga County CA\$H Coalition helps low-to-moderate income individuals and families increase financial stability and empowerment.

We promote the Earned Income Tax Credit and other valuable tax benefits, provide free tax filing services and offer financial education and coaching through Coalition members to empower people in our community to better understand their options when it comes to spending, saving, and borrowing. Our goal is to help families build assets, use credit wisely and ultimately achieve financial security.

In order to provide free tax preparation through our Volunteer Income Tax Assistance program, a service that brought over \$6 million back to our community through refunds last year, we rely on community members like you to volunteer by establishing and organizing sites, assisting taxpayers with paperwork, preparing taxes, and reviewing returns for quality and accuracy.

### Site Coordinator Overview:

The CA\$H Coalition is seeking well-organized and independent leaders to serve as Site Coordinators for our Drop Off VITA sites. The VITA program is administered by the IRS and, as such, is governed by specific quality guidelines and standards of operations. The Site Coordinator is responsible for ensuring that the site they are assigned to adheres to these standards and should act as a liaison between the site and its volunteers, the VITA Program Coordinator, and the IRS. With the assistance of the VITA Program Coordinator, the Site Coordinator will be responsible for managing volunteers and ensuring quality returns.

### Essential Duties and Responsibilities:

- Ensure the following to fulfill Quality Site Requirements:
  - Services provided are free (at no cost to the taxpayers)
  - Site opens for intake as scheduled and is adequately staffed
  - Quality review is being conducted
  - All privacy/security standards set by the IRS are followed
  - All volunteers are utilizing the correct EFIN & SIDN in the software defaults for relevant forms
  - Act as TaxSlayer software “Administrator” and set up user accounts for approved volunteers
  - Confirm that transmission of tax returns and necessary follow up are done in a timely manner
- Act as liaison between volunteers, the volunteer site and VITA Program coordinator:
  - Communicate site needs and issues with VITA Program Coordinator regularly
  - Notify VITA Program Coordinator and SPEC (IRS) of any necessary changes to site operating days and/or hours
  - Update VITA Program Coordinator regarding listing of volunteers that have successfully passed the Volunteer Tax training and certification

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- Manage volunteers and volunteer activities:
  - Ensure that volunteers have sufficient access to software and materials necessary for virtual preparation, and that these materials are properly used by volunteers
  - Maintain schedules for volunteers to prepare tax returns; maintain a list of all volunteers scheduled for each date and their phone numbers; ensure volunteers keep preparation appointments and document how many hours worked each day.
  - Provide technical assistance/encourage volunteers to use the IRS toll-free Volunteer Hotline.
  - Inform volunteers of IRS quality alerts during the tax season
- Act as the face of the site, providing helpful information and quality customer service:
  - Provide customers with information on other sites and means of free tax preparation if site is unable to assist them
  - Ensure that customers with more difficult tax questions are either referred to the appropriate IRS publication, help line or advised to seek the assistance of a professional preparer

### **Qualifications and Requirements:**

Required certifications: IRS Approved Site Coordinator Training, Basic Tax preparation Certification, Advanced Tax Preparation Certification (if possible) – CA\$H Coalition/VITA Program Coordinator can/will assist with attaining these qualifications

- Prior tax preparation/accounting experience preferred
- Organizational and leadership/management skills
- Skilled at taking initiative, problem solving and working independently
- Strong verbal skills to communicate effectively with volunteers, tax payers and community partners
- Prior experience with volunteer management is preferred but not required
- Proficient computer skills
- Ability to manage issues and crisis calmly and effectively

### **Volunteer Position Details:**

- Seasonal Position Jan-April, with some site preparation work required in November-December
- 10-20 hours per week