



## JOB ANNOUNCEMENT

Title: **Assistant Site Manager**  
Department: Asset Building Programs  
Supervised by: Tax Site Manager  
Duration & Hours: January 21 to April 18 (with training dates in Jan, 2017)  
Hours and days will vary by tax site  
Locations: Bronzeville, Joliet, Aurora, Uptown and Waukegan  
Classification: Seasonal; temporary  
Date: December

### ORGANIZATIONAL SUMMARY:

The Center for Economic Progress (CEP) envisions an America of shared prosperity, where all working families can access the financial opportunities they need to succeed. CEP helps low-income, working families as a trusted provider of tax and financial services. Everything we do, from direct service to informing public policy, improves the financial stability of those we serve. Refer to [www.economicprogress.org](http://www.economicprogress.org) for more information about CEP's programs.

### SUMMARY:

The Assistant Site Manager is responsible for ensuring the timely and accurate filing of electronic tax returns at a community-based volunteer-driven tax site operated by the Center for Economic Progress (CEP). The Assistant Site Manager provides support and guidance to volunteer staff who prepare tax returns for low and moderate-income taxpayers. The assistant site manager helps to ensure effective integration of tax and financial capability services onsite, including tax return preparation and tax time financial capability. This position provides additional assistance as directed by the site manager.

### RESPONSIBILITIES

Tax Return Transmittal 30%

- Promptly and accurately transmit e-filed tax returns
- Promptly resolve rejected returns, according to CEP guidelines and procedures
- Work with volunteers and site managers to reduce errors that trigger e-file rejections
- Promptly notify appropriate CEP staff of significant e-file problems or delays

Operational Support 55%

- Support site operations as directed by site manager, including but not limited to intake, tax preparation, financial capability services integration and promotion, quality review, sorting, volunteer management, and supply management
- Provide positive and professional experience to volunteers through ongoing performance feedback and support
- Serve as point person for orienting new volunteers, tracking volunteer data including hours served, and approving volunteer time
- Address client questions related to previously prepared returns. Follow through with site manager to ensure prompt resolution of service problems
- Follow mandatory procedures as outlined in training, the operational manual, and communication from CEP staff
- Maintain a well-organized facility that flows smoothly, ensures adequate supplies, and securely retains required files and documentation
- Assist with site setup and tear down, if applicable
- Complete time reports, expense reports, and other paperwork as required in a timely fashion

#### Customer Service

*(10%)*

- Ensure clients are treated fairly and professionally, with courtesy and respect
- Protect and maintain confidentiality of client information
- Ensure compliance with IRS guidelines regarding discrimination
- Apply tax law with integrity and fairness to all clients, ensuring an accurate return is filed and the client leaves with a positive experience

#### Ethics

*(5%)*

- Ensure adherence to the standards of conduct outlined in Form 13615, Volunteer Agreement, by all site staff and volunteers.
- Apply the values and mission of CEP in all aspects of site management
- Promptly identify and address ethical lapses in accordance with CEP and IRS guidelines.

### **QUALIFICATIONS**

Job Experience: Minimum of two years general office experience working with computers. Experience preparing income tax returns with tax software preferred. Previous working experience with CEP or other VITA program strongly preferred. Experience working with a diverse population of clients and/or volunteers in a customer service environment helpful.

Demonstrated Competencies: Works well with a diverse population of clients and volunteers. Works well in a fast-paced environment with multiple priorities. Able to adapt to new technology and new software products. Possesses a supportive and professional manner.

Specialized Skills: Demonstrates superior customer service skills and strong general office computer skills. Strong preference for individuals with knowledge of professional tax preparation software. Ability to speak a specific second language may be required for employment in some locations.

All Site staff is required to attend training as determined by CEP. Successful candidates must also pass a tax preparation certification test.

## **WORK ENVIRONMENT**

- This position operates in partner host-site locations that may not necessarily be fully accessible.
- This role routinely uses standard office equipment such as computers, phones, photocopiers, scanners, filing cabinets, and fax machines.
- While performing the duties of this job, the employee is regularly required to talk or hear.
- The employee frequently is required to stand; walk; use hands to finger, handle or feel; and reach with hands and arms. The employee must frequently lift and/or move objects up to 50 pounds.
- This position will require working weekends and evenings.
- Regular travel to off-site locations in the Chicago metro area is required. Occasionally, some out-of-the-area travel may be expected.
- Workplace is a smoke- and drug-free environment.
- Decisions and criteria governing the employment relationship with all employees are made in a non-discriminatory manner, without regard to race, ethnicity, creed, religion, color, sex, sexual orientation, gender identity or expression, age, national origin, citizenship status, military service and/or marital status, order of protection status, handicap, disability, or any other factor determined to be unlawful by federal, state, or local statutes.

## **COMPENSATION**

- Hourly pay ranges from \$12-\$16, commensurate with experience.
- Payroll is operated through Randstad Inc.

## **TO APPLY**

- Submit cover letter and resume to Udodi Okoh, [uokoh@economicprogress.org](mailto:uokoh@economicprogress.org)
- Please write your name (Last, First) in the re: line of your e-mail.
- Incomplete applications will not be accepted.
- Candidates will be considered immediately and the position begins in early January.