



JOB ANNOUNCEMENT

Job Title: **Tax Site Manager**
Department: Asset Building Programs
Supervised by: Operations Manager, Asset Building Programs
Supervises: Assistant Site Manager, Drop Off Manager, Financial Capability Manager
Duration & Hours: January 21 to April 18 (with training dates in Jan)
Hours and days will vary by tax site
Locations: 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 for more information about CEP's programs.

SUMMARY:

The site manager is responsible for overall management of a community-based, volunteer-driven tax site operated by the Center for Economic Progress (CEP). The site manager oversees all aspects of the operation to ensure high quality and fair service to all clients, including appropriate application of tax law, professional management and interactions with volunteers; application of high ethical standards, and adherence to CEP and Internal Revenue Service (IRS) policies, procedures, and guidelines. The site manager ensures effective integration of tax and financial services onsite, including tax preparation and tax time financial capability.

RESPONSIBILITIES

- Operational Management (30%)
- Maintain clear understanding of available tax and financial services onsite, and ensure smooth integration into site flow and operations

- Maintain a well-organized facility that flows smoothly, ensures adequate supplies, and securely retains required files, documentation, and equipment
- Maximize and efficiently utilize resources and tools available to ensure quality service
- Follow mandatory procedures as outlined in training and communication from CEP staff
- Assist with site setup and tear down, if applicable
- Ensure timely communication and responses to CEP staff, specifically in the critical areas of technology, supply management, tax law inquiries, on-site incidents/complaints, volunteer and staff management, tax time financial capability activities, and attendance conflicts

Quality Assurance (35%)

- Ensure accurate tax return preparation by on-site tax preparers
- Implement and oversee effective quality review procedures in accordance with CEP and IRS guidelines
- Oversee prompt transmittal of tax returns and ensure resolution of rejects and problem returns by designated staff within one week of rejection date.
- Answer volunteer and client questions accurately and in a timely fashion

Volunteer Management (15%)

- Provide positive and professional experience for all volunteers, staff, and financial services partners by providing ongoing performance feedback, recognition, and support
- Delegate responsibilities and tasks to volunteers and staff based on site needs and volunteer roles, interests, and abilities

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.

Reporting and Communication

(5%)

- Ensure prompt response to email inquiries to CEP email address (sitename@economicprogress.org)
- Identify and report to CEP staff significant systemic and procedural problems that affect site operations
- Ensure timely completion of time reporting, expense reports, volunteer hours' approval and other volunteer-related paperwork according to outlined schedules and requirements

QUALIFICATIONS

Job Experience: Previous tax return preparation required; work experience with CEP or another tax assistance program strongly preferred. Experience working with diverse populations of clients and/or volunteers in a customer service context preferred.

Demonstrated Competencies: Works well with diverse populations of clients and volunteers. Displays supportive and professional conduct in high pressure, fast-paced environment with multiple priorities. Able to translate complex topics into understandable concepts for clients and volunteers. Preference is for individuals familiar with the community where the site is located.

Specialized Skills: Basic computer skills. Strong preference for individuals with knowledge of professional tax preparation software. Working knowledge of federal and Illinois state tax law, particularly areas that impact low-income families. Specific second language skills may be required for employment in some locations.

Successful candidates must pass the basic and advance tax preparation certification tests. Site staff are also required to attend training determined by CEP.

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 \$20-\$25, commensurate with experience.
- Payroll is operated through Randstad Inc.

TO APPLY

- Submit cover letter and resume to Udodi Okoh, 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 December.