

United Way of Northeast Florida

Position Description

# Position Title: Tax Program Manager, RealSense

**Department:** Community Impact

**Reports to:** Director – Financial Stability

**Reviewed:** January 2019 **FLSA Status:** Exempt

***Vision and Mission*:**

At United Way of Northeast Florida, we envision a community of opportunity where everyone has hope and can reach their full potential. Our mission is to solve our community’s toughest challenges by connecting people, resources and ideas**.**

## *Purpose of Position*:

The Tax Program Manager is an integral member of UWNEFL’s Community Impact team and will provide strategic leadership for UWNEFL’s premier poverty reduction strategy, RealSense. This foundational strategy has crosscutting implications for the organization’s overall body of impact work: driving results in the areas of youth success, financial stability, and health as well as investing in historically challenged neighborhoods connecting efforts to impact generational poverty. The Manager will ensure successful and effective management of the Volunteer Income Tax Assistance (VITA) and MyFree Taxes initiatives throughout Northeast Florida including cross-collaboration and communication throughout UWNEFL, ongoing communication with grantors and other key stakeholders including the IRS SPEC Relationship Manager, and the planning, and evaluation of strategies for volunteer recruitment, retention, and training. The Manager will represent UWNEFL at local, state, and national conferences and meetings and ensure that UWNEFL’s agenda and investments are integrated, leveraged and aligned with the many facets of financial stability work throughout Northeast Florida.

***Key Responsibilities and Essential Functions***:

**TAX SITE DEVELOPMENT AND OPERATIONS**

The Tax Program Manager is experienced in program management and operations including staff leadership, scheduling, coordination, logistics and budgeting. The Manager enjoys working in a fast-paced environment, problem solving, negotiating, and meeting deadlines. Specifically, the Tax Program Manager will:

* Identify and confirm all tax site locations, including hours/days of operation and staffing needs
* Manage scheduling of mobile tax site locations, including staffing needs
* Conduct quality inspections of tax site locations to ensure adherence to IRS guidelines and standards
* Ensure tax sites are fully staffed with tax preparers during hours/days of operation
* Provide technical support to all tax sites, Site Coordinators and volunteers
* Serve as primary point of contact with IRS
* Serve as administrator of the tax program appointment scheduling program
* Recruit, hire and train 30-35 paid seasonal tax professionals in the roles of Site Coordinator and Tax Preparer, coordinating with United Way Human Resources and temporary staffing agency to secure contract for services
* Track all budgeted hours for paid tax site positions
* Oversee all aspects of equipment purchase (as needed) and distribution of equipment to the tax sites
* Coordinate with IT personnel and IRS to ensure proper software installation and set up
* Oversee collection and re-inventory of tax site equipment and supplies at the end of the tax season
* Secure training locations including negotiating contracts and fees
* Develop the training schedule for all tax program positions and ensure all training sessions are fully staffed
* Develop training curricula as necessary

**MARKETING**

Understanding the importance of creative and effective storytelling, the relationship between effective marketing and program results, and the overall RealSense business plan, the Tax Program Manager works purposefully with the Marketing/Communications, Resource Development and the Community Impact teams to achieve desired results. Specifically, the Tax Program Manager will:

* Work in partnership with the Director of Financial Stability to develop a marketing strategy for VITA and MyFreeTaxes for Northeast Florida
* Ensure tax site information on the UWNEFL website and 2-1-1 is up-to-date
* Regularly submit client and volunteer stories to Marketing/Communications and Community Impact that highlight successes and challenges of program

**REPORTING**

The Tax Program Manager is detail oriented and has strong competencies in data collection, presentation, and reporting. Specifically, the Tax Program Manager will:

* Provide data, information and support with preparing grant reports and applications
* Prepare, submit and communicate weekly production reports to monitor progress during tax season
* Prepare end-of-season progress reports, statistical and demographic reports and other information needed for grant reporting

**VOLUNTEER COORDINATION AND MANAGEMENT**

The Tax Program Manager is experienced in working with diverse sets of volunteers, volunteer recruitment and retention. He/she understands the nuances that are associated with volunteer-driven initiatives and excels in communication. He/she is flexible and committed to meeting the needs of volunteers and UWNEFL’s Volunteer and Community Engagement team. Specifically, the Tax Program Manager will assist the Volunteer Coordinator in:

* + collecting client and volunteer success stories
  + planning and executing tax site related events
  + developing and administering volunteer recruitment strategies

***Experience / Position Requirements*:**

* + 4-year college degree preferred
  + 2-4 years progressively responsible, related experience
  + Excellent time management, planning and organizing skills
  + Familiarity with VITA tax site processes and software
  + Program/Project Management experience
  + Excellent presentation and computer skills
  + Must be proficient in the Microsoft Office Suite: Outlook, Word, Excel, and PowerPoint

***Professional Core Competencies Required***:

* Mission Focused: Creates real social change that leads to better lives and healthier communities. This drives performance and professional motivations.
* Relationship Oriented: Places people before process and is astute in cultivating and managing relationships toward a common goal.
* Collaborator (Includes teamwork and communication): Understands the roles and contributions of all sectors of the community and can mobilize resources (financial & human) through meaningful engagement. Strong supporter of a team environment.
* Results Driven: Dedicates efforts to shared and measurable goals for the common good; creating, resourcing, scaling and leveraging strategies and innovations for broad investment and impact.
* Brand Steward: Understands role in growing and protecting the reputation and results of the greater network.

***General Physical Requirements for Essential Functions of the Job:***

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job the employee is regularly required to sit, talk, and/or hear. Continual use of the hands with wrist and finger movement using a keyboard is required*.* Specific vision abilities required by this job include long hours viewing a computer monitor screen. The employee may occasionally travel using personal vehicle and/or work outside normal office environment.

*This description is not designed to contain a comprehensive inventory of all responsibilities and qualifications required of all team members assigned to this position. It is intended only to describe the key elements relative to each section. Also, duties and/or requirements of this position may be modified, added or deleted at any time. This supersedes all descriptions previously written for the same position. Unique equivalent skills and experience may possibly substitute for required position requirements.*

*United Way of Northeast Florida is an Equal Opportunity Employer and a Drug Free Work Environment.*