



## **JOB DESCRIPTION**

**Position Title: VITA Site Manager**

**Status: Exempt, Temporary**

**Part time 20 hrs / week: November –January 2019; Full-time: February – May 2019, end date May 3<sup>rd</sup>**

**Location: Oakland, California**

Self-Help Federal Credit Union (SHFCU) is seeking a qualified individual to manage its Volunteer Income Tax Assistance site in West Oakland. This will include preparing, operating, and assuming full responsibility for high quality tax preparation and connecting filers with Self-Help Federal asset-building products at the Volunteer Income Tax Assistance (VITA) site for the 2018 tax season. This individual will work independently from Self-Help Federal's West Oakland branch and will report to the North Bay Area Manager.

Self-Help Federal has operated its VITA site for 16 years and the site has become a crucial service for low-income residents in West Oakland and surrounding communities. At the site we prepare approximately 900 income tax returns free of charge and provide filers, many of whom are unbanked, the opportunity to open savings and checking accounts at the credit union. This work is done entirely by volunteers, with the exception of the VITA Site Manager.

### **Responsibilities:**

- Prepare for the VITA tax season which includes representing Self-Help Federal at monthly United Way of the Bay Area Earn It! Keep It! Save It! meetings, acting as the credit union's liaison with the IRS, interfacing with staff from Bridge Housing and Mandela Gateway (who host our site) ordering supplies, and marketing the site and credit union to community members
- Recruit, train, and manage tax preparation volunteers and ensure they are supported throughout the tax season
- Manage the relationship with an independent Security Guard for the site
- Complete an IRS on-line course on Basic, and Advanced tax law and pass an exam
- Lead a 3-day tax preparation training course & orientation in January for all volunteers
- Orient all volunteers to the credit union, product suite, and link between asset development and tax returns
- Manage filer appointment scheduling and volunteer shifts to ensure that the site has adequate coverage
- Provide on-site management during VITA hours, which will include weekday evenings and Saturdays, from January through April. In addition to the volunteer management responsibilities outlined above, this includes, but is not limited to, preparing tax returns, electronically filing returns, correcting errors on rejected returns, setting and cleaning up the site, ensuring that all IRS procedures are followed, and maintaining the confidentiality of sensitive client documents
- Coordinate with West Oakland branch staff to open savings and checking accounts remotely
- Promote savings at tax time through local and national campaigns
- Facilitate satellite tax sites with partners
- Lead volunteer appreciation efforts
- Identify and follow up on tasks that make the site run more smoothly and improve the experience for volunteers and clients

- Monitor VITA expenses, submit check and reimbursement requests as needed, and stay within budget
- Download or create requested reports from tax software
- Monitor tax preparation and account opening goals

**Requirements:**

- Management experience
- Ability to work independently
- Computer literacy
- Strong organizational and communication skills
- Sensitivity to the financial experiences and diverse cultural backgrounds of Self-Help Federal's membership
- Experience working with and managing volunteers
- Strong customer service skills
- Flexibility to work evenings/weekends during the tax season (Jan-April)
- Tax preparation experience

**Desired Qualifications:**

- Experience with the VITA tax preparation program
- Bachelor's degree
- Spanish fluency

**About us:**

Self-Help Federal Credit Union was formed in 2008 to build a network of credit union branches to operate on a scale uncommon in the community development industry. Through a series of mergers, acquisitions, and new branch launches, in California, Illinois, and Wisconsin we are building a community development credit union that aims to provide high-impact financial services to working class communities.

Self-Help Federal now has 27 branches, over \$1 Billion in assets, and serves over 79,000 members. We are committed to delivering safe and affordable savings, transparently-priced accounts and a full suite of loans – small dollar, citizenship, unsecured consumer, auto, and mortgage – often to borrowers who could not access responsible services elsewhere.

**We are an equal opportunity employer:**

Self-Help is committed to providing equal employment opportunities to all persons regardless of race, color, class, age, religion, disability that can be accommodated, marital status (including domestic partner status), ancestry, nationality, national origin, religion (and lack thereof), family status, sex (including pregnancy, childbirth, and related medical conditions), other medical condition and/or disability: physical or mental, AIDS/HIV status, genetic information, sexual identity, gender identification (including transgender status), sexual orientation, political activities or affiliations, and veteran status.

**Compensation:**

Competitive, based on experience. Temporary employees are eligible for benefits on the same terms as other employees when hired for specific jobs with automatic termination dates of four months or greater.

**Please apply to our Human Resources Department:**

Interested individuals please send a resume and cover letter to [cahiringmanager@self-help.org](mailto:cahiringmanager@self-help.org) and reference this job, "VITA Site Manager" in the subject line of your message.

**The Self-Help Federal Credit Union is an Equal Opportunity Employer**