

## Tax Site Coordinator/Manager – Position Description

The Tax Site Coordinator / Manager oversees and manages the day-to-day activities at a Tri-CAP tax site with the purpose of ensuring that each tax return prepared is accurate and complete. The tax site coordinator should have previous experience at a Tri-CAP tax site as both a Preparer and a Reviewer. To apply, please sign up via our website, [www.tricap.org](http://www.tricap.org). You may also contact the Tax Program Manager, at [tricaptaxes@tricap.org](mailto:tricaptaxes@tricap.org) or 320-251-1612.

### Roles and responsibilities:

- Oversee the management of tax services to low- and moderate-income taxpayers in compliance with the rules and procedures set forth by Tri-CAP and the Internal Revenue Service.
- Coordinate the day-to-day activities of tax services at Tri-CAP tax sites or partner organizations.
- Work with the Tax Program Manager to assist with volunteer tax training during the months of December and January.
- Provides timely and on-going feedback and open communication with Tax Program Manager to identify best practices in service delivery and areas for program improvement
- Attends mid-season and post- season debriefs and participates in performance goal setting and evaluation
- Attends required pre-season trainings set forth by Tri-CAP.
- Monitor, evaluate and report on individual tax site performance throughout the tax season.
- Manage and enforce procedures to keep confidential all taxpayer information and documents at tax sites.
- Direct the preparation and quality review of federal and state tax returns.
- Manage the day-to-day activities at one seasonal tax sites.
- Supervise and support volunteer staff.
- Ensure IRS Quality Alerts are followed at the tax sites and provide tax updates and changes to volunteers at the start of each tax clinic.
- Oversee the maintenance of tax site equipment and ensure tax software is updated to its most current level in a timely fashion.
- Inventory and make available the necessary tax forms and supplies to support daily operations.
- Return all necessary documents and files to the Tri-CAP main office at the end of each tax clinic.

### Skills required:

- Strong background in individual income tax required, with knowledge of low-income tax preferred
- At least two years experience preparing individual income tax returns
- High attention to detail
- Ability to provide feedback to other volunteers in a clear and supportive manner
- Experience with Volunteer Income Tax Assistance (VITA) preferred
- Enjoy working in a diverse ethnic and socio-economic environment

### Commitment and timeline:

January – April 15

- Training on Tax Law - federal and state- January 8 to 10 hours
- Software training 4 to 12 hours
- Coordinate activities at one location – End of January – April

### Locations:

Tri-CAP currently operates sites in our service area of Stearns, Benton and Sherburne counties. Volunteers select a site that is convenient to work at and best works with their schedule.