



**United Way of
Indian River County**

JOB DESCRIPTION

Job Title: **VITA Program Specialist** (Volunteer Income Tax Assistance)

Classification Part Time /Non-Exempt
30-35 hours/week, M-F, hours may vary
November through April

Reports to: Community Impact

Position Summary: United Way's VITA Free Tax Prep program offers free tax preparation services to low- and moderate-income taxpayers throughout Indian River County by participating in the Internal Revenue Service (IRS) Volunteer Income Tax Assistance (VITA) Program. The program is a partnership with the IRS, United Way, and several local organizations.

Core Responsibilities

The VITA Program Specialist is a part of the VITA team and provides courteous and prompt support to clients seeking Tax Appointments. The VITA Program Specialist will answer telephone calls regarding the 2024 Filing Season, Earned Income Tax Credits, and Free Tax Prep qualifications. Program Specialist will screen and direct qualified callers to available free tax preparation sites across the County and/or schedule appointments for qualified callers through an online scheduling system. The VITA Program Specialist will also provide support to the VITA team members at multiple VITA sites. Possible duties include ensuring each site has needed supplies, coordinating logistics with the VITA host site (i.e. library UP Center, etc)

Under the direction of the Coordinator, the Program Specialist will:

- Complete necessary VITA training and certification tests
- Respond to all Appointment phone calls providing courteous and accurate service
- Screen callers for free tax filing eligibility
- Schedule free tax filing appointments for callers when appropriate
- Direct callers to available free tax preparation sites when appropriate
- Direct callers to 2-1-1 for needs outside of free tax filing services
- Attend relevant meetings and committees as directed by Program Coordinator

- Assist at free tax preparation events when needed as an Assistant Site Coordinator, Greeter, and Quality Reviewer
- Complete additional related tasks when requested

30-35 hours/week, Monday-Friday, hours may vary. If scheduling allows, Specialist may be asked to assist with tax preparation events on evenings and weekends.

Education & Experience Requirements: Minimum: GED and/or some college experience

Preferred: Associate's degree or any equivalent combination of training and experience which provides the required knowledge, skills and abilities

Desirable Skills and Qualities:

The ideal VITA Program Specialist will have the following education and skill requirements:

- Excellent verbal communication, listening, and problem-solving skills
- Be computer literate and have comfort scheduling callers through an on-line database system
- Experience with hotline, call-center, or customer service preferred
- Ability to work independently in a fast-paced setting
- Ability to successfully complete IRS VITA training and certification requirements
- Bi-lingual Spanish a plus
- Exceptional verbal communication skills.
- Active listener.
- Effective multitasker.
- Proficiency in MS Word and MS Excel.
- Take personal initiative – working both independently and as a team member.

Personal Characteristics:

- A reliable and enthusiastic team player.
- Seeks creative and innovative solutions.
- Exhibits high personal standards of integrity, honesty and character.
- Easily move between being an independent self-starter and collaborative team member.
- Presents a high degree of maturity, reliability and self-confidence.
- Strong organizational and time management skills with exceptional attention to detail.
- Passion, humility, integrity, positive attitude, mission-driven, and self-directed.
- A polite approach and desire to be helpful to others.
- A pleasant smile and helpful attitude.

Training:

All staff are required to pass (at minimum) the online IRS certifications in Basic, Advanced, and Health Savings Account once hired. Training is online and in-person through IRS and United Way. Exams are multiple choice and open book. While all training is self-paced and can be completed online, you will be offered in-house days to complete your certifications.

Physical Requirements:

The physical demands described here are representative of those that must be met by staff to successfully perform the essential functions of this job. The staff member is required to talk and hear in-person and on the phone. The staff member is often required to sit and use their hands and fingers to handle or feel. The staff member is required to stand, walk, and reach with arms and hands. Vision abilities required by this job include close vision. Further details of established essential functions for this position will be addressed/discussed during the interview process.

This job description is subject to change at any time.

United Way of Indian River County is an Equal Opportunity Employer. All qualified applicants are encouraged to apply and will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, protected veteran status, or any other legally protected characteristic or status.

TO APPLY: Please forward cover letter and resume to

Deana.Shatley@unitedwayirc.org

Salary Range: \$20-\$30/Hour • 30-35 hours/week, M-F • hours may vary • November - April