

## Community Action Partnership of Ramsey & Washington Counties Volunteer Position Description



Title: **VITA TAX INTAKE SPECIALIST (VIRTUAL)**

Reports To: Financial Services Coordinator

Type: Volunteer Position (Internship Available)

Duration: December 2020- April 2021

Location: Volunteers are expected to work from home, all services will be provided virtually.

**Position Summary:** The Volunteer VITA Tax Intake Specialist meets with clients virtually to coordinate the tax clinic check-in process, ensure participants have all necessary paperwork for their tax appointment, and make referrals to connect households with relevant community resources providing one-on-one follow-up when necessary.

**Benefits of Volunteering:** Become an IRS-certified Volunteer Income Tax Assistant (VITA). Gain real life experience providing resource information and helping households to gain access to necessary financial support. Knowledge that you are helping families thrive!

### **Essential Functions & Duties:**

- Screen and schedule interested participants according to tax needs
- Complete intake paperwork, answer questions, and provide great customer service
- Have knowledge of public benefits and community resources
- Assist clients with eligibility and enrollment for financial services, food support, medical coverage and energy assistance
- Work cooperatively with staff and other volunteers to ensure clients receive quality customer service experience.
- Abide by all CAPRW confidentiality policies and procedures
- Attend required basic tax-law training sessions and successfully attain basic IRS tax-law certification (training and coaching is provided to ensure success)
- Other duties as assigned

**Safety:** Responsible for conducting all duties in a safe manner.

**Affirmative Action:** Responsible for following an affirmative action plan as set forth and signed by the Board of Directors.

### **Qualifications:**

#### **Education & Experience:**

- Must be at least 18 years of age

- High school diploma/GED/equivalent is required
- Desire to learn how to complete IRS and MN Income Tax forms (no experience required)
- Desire to help the community (training and coaching is provided to ensure success)

**Abilities & Skills:** In order to be successful in this position, the volunteer will at minimum need to possess the following abilities and skills:

- Strong customer service skills and ability to discuss sensitive matters with empathy and respect
- Proficient with technology and working with computers, and ability to coach clients through using technology
- Motivation to work completely virtually, manage scheduled hours and use digital tracking and communication tools
- Excellent attention to detail
- Must be comfortable interacting with people of diverse backgrounds, education, economic status, and cultures
- Demonstrated ability to handle confidential information in a professional and discreet manner
- Fluency in English language (written and spoken). Bilingual in Hmong, Karen, Nepali, Somali, Spanish or another language desired
- Must successfully pass a criminal background check and provide references

**Physical Requirements:** Normal office exertion required.

**Mental Requirements:** This position requires the ability to prioritize and manage multiple tasks.

**Environmental Requirements:** Volunteering from home (all required technology is provided).

**Time Commitment:**

- 10-15 hours of IRS and Minnesota tax law training (provided online).
- Complete training during December 2020 or January 2021
- Successful completion of IRS-Tax Law Certification after training (coaching provided)
- Minimum of 4-hours per week at a tax clinic, February 1st-April 16<sup>th</sup>, 2020

**Tax Clinic Schedule and Locations:**

- A minimum of four hours per week, may be completed in two shifts. Must be available to work Monday-Tuesday.

**Apply to Become a Volunteer:**

**New Volunteer:** Click here to apply <https://forms.gle/EQfr1zrPRDE9Qp9d8>

**Returning Volunteer:** All returning volunteers please send an email with your full name and a phone number to the Volunteer Coordinator at [volunteers@caprw.org](mailto:volunteers@caprw.org). The Volunteer Coordinator will contact you shortly.

The mission of **Community Action** is to reduce the causes of poverty and its impact on people's lives in our community. Community Action Partnership of Ramsey & Washington Counties provides a variety of programs including Energy Assistance, Energy Conservation, Head Start, Early Head Start, Civic and Community Engagement Programs. Visit [www.caprw.org](http://www.caprw.org) to learn more.

*Note: The above statements are intended to describe the nature and level of efforts being performed by persons assigned to this volunteer position. They are not intended to be an exhaustive listing of all responsibilities, duties, and skills required, and management reserves the right to make modifications at their discretion.*