



Title: **INTAKE AND RESOURCE SPECIALIST - VITA TAX CLINIC**
Reports To: Financial Services Coordinator
Type: Volunteer Position (Internship Available)
Duration: Spring 2020; ongoing every spring

Position Summary:

The Intake and Resource Specialist volunteer coordinates the tax clinic check-in process, ensures participants have all necessary paperwork for their tax appointment, and makes determinations to connect households with relevant community resources providing one-on-one follow-up when necessary.

Benefits of Volunteering:

Become a certified Volunteer Income Tax Assistant (VITA). Gain real life experience providing resource information and working with households to gain access to necessary financial support. Knowledge that you are helping families thrive!

Essential Functions:

Duties & Responsibilities:

- 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
- Screen and support enrollment in financial services, food support, medical coverage and energy assistance
- Team-oriented, able to work cooperatively with staff and other volunteers
- Ability to abide by all confidentiality policies and procedures
- Attend 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 to follow affirmative action plan as set forth and signed by the Board of Directors.

Qualifications:

Education & Experience:

- Must be at least 18 years of age
- Must possess or be pursuing a two or four year degree in human services or related field (such as pre-social work, sociology, psychology, public health, etc)
- No previous tax experience needed (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:

- Comfortable with technology and working with computers
- Excellent attention to detail
- Excellent communication skills and ability to communicate clearly with empathy and respect
- Must be comfortable interacting with people of diverse backgrounds, education, economic status, and culture
- 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
- Ability to turn in timesheet on a monthly basis to the Volunteer Specialist

Physical Requirements:

Normal office exertion required.

Mental Requirements:

This position requires the ability to prioritize and manage multiple tasks.

Environmental Requirements:

Normal office environment

Time Commitment:

- 10-15 hours of IRS and Minnesota Tax law training (provided in person or online)
- Complete training during December 2019 or January 2020
- Successful completion of IRS-Tax Law certification after training (coaching provided)
- Minimum of 4-hours per week at a tax clinic, February 1st-April 16th, 2020
- Flexible schedule available (if you need to take some time off)
- View schedule below

Tax Clinic Schedule and Locations:

- 9am - 4pm Saturdays, St. Paul (first priority); 450 Syndicate St North, St Paul, MN 55104 (Office/Tax Site is located on the Green Line train route)
- 9am - 4pm Thursdays, Woodbury; 7645 Currell Blvd, Woodbury, MN 55125 (Washington County CDA office)

Advance Registration for College Students:

Yes, you can reserve this internship position by registering in advance. Example: be accepted for spring term by registering during fall term and meeting with us before you depart for break.

REGISTRATION INFORMATION:

Complete an Ongoing Registration Form at www.capr.org/take-action/volunteer and email/scan resume & references to volunteers@caprw.org

Deadline for registration is December 13th, 2019 to guarantee a position for the 2020 tax season. Registration will continue until all positions are filled or until January 31, 2020 - whichever occurs first.

Questions? Email or call 651-603-5979

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.capr.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.

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