



Campaign For Working Families, Inc. Job Description

Job Title:	Director of Tax Operations	Last Updated:	March 2023
Department:	Tax Operations	Primary Manager:	Chief Program Officer
DOL Status	Full-Time	FLSA Exemption:	Exempt

Overview Campaign for Working Families

The Campaign for Working Families, Inc. (CWF) facilitates expanded income security to low and moderate wage earners in the Philadelphia and Southern New Jersey regions by increasing their access to the Earned Income Tax Credit (EITC) and other federal credits, low-cost financial services, and products and public benefits. During the tax season, the Campaign operates many VITA (Volunteer Income Tax Assistance) tax sites throughout Philadelphia and Southern New Jersey, supported by volunteer tax preparers that provide free tax preparation services for low and moderate-income families and individuals. Additionally, CWF will be providing unemployment assistance to those seeking unemployment benefits, while working to connect the unemployed with workforce access and opportunities.

Position Summary

The Director of Tax Operations is responsible for leading all tax sites and ensuring operational excellence and continuous growth by leading the tax operations management team and establishing and maintaining strategic plans, priorities and project management that drive operational excellence. This position is also responsible for ensuring that policies and procedures are executed and followed in accordance with the IRS VITA rules and regulations. Serves as lead for IRS registration, reporting, collaboration, database management and e-services.

Essential Functions

Role and Responsibilities

- Provide strategic direction and leadership to successfully lead in the advancement of tax operation strategies to ensure successful program systems, operations and outcomes.
- Grow the strategic approach and collaborative capacity to support successful tax operations for individuals served by CWF across its regional footprint.
- Develop tax programming informed by best practices, tax staff, tax filers, while being responsive to the needs and expectations of CWF and its funders/investors.
- Coordinate with existing internal programs serving tax filers in connecting tax filers to beneficial services and resources, and ensure information and services are presented to staff and tax filers across the tax operation.
- Establish a standard set of defined metrics of success that can be evaluated and integrated within the larger organizational outcome metrics.
- Acknowledge program successes and promote opportunities for growth.
- Exhibit leadership and guidance to supervised staff that is reflective of extending opportunities for professional growth, including staff in related functions inclusive of recruitment and selection, performance coaching and evaluation, training, staff development, motivation, communication and building a shared vision.
- Manage program tax and/or grant contracts, assist in the development of budgets, including allocating resources appropriately towards program goals through purchase orders and professional contracts as needed.
- Responsible for funder requested/ mandated reporting including all progress and final reports.
- Lead in the advancement and expansion of tax training and associated/relevant materials (i.e. Tax Site Operations

Manual, Site Manager Guide, etc.).

- Obtain all needed and necessary certification(s) to meet program requirements, while ensuring overall compliance.
- Develop and implement a quality assurance and compliance process to improve overall tax operations toward supporting an increased experience for staff and tax filers.
- Complete other duties as assigned.

Tax Compliance and Quality Control

- Oversee IRS compliance relative to quality procedures, reviews, and site visits.
- Lead the cross training of volunteers to support all aspects of the tax preparation process beyond tax preparation (quality control; filing; screening customers etc.).
- Implement activities that drive volunteer retention and satisfaction to ensure future volunteer availability and ongoing support at the tax site.
- Manage accurate and timely electronic filing, confirmation, and rejection reconciliation process for all tax returns prepared at the tax site.
- Enforce accurate and complete file management process for all completed tax returns.

Customer Service

- Lead in the creation of a welcoming atmosphere for tax customers, staff and volunteers.
- Serve as the central point of contact for all customer service needs and/or inquiries across tax site operations and the call center.

Grant Writing and Data Reporting

- Assist in the development and writing of IRS or Tax related grant proposals.
- Maintain calendar to ensure timely submission of grant deadlines and reports.
- Prepare and assemble grant letters, proposals, budgets, and presentations.
- Prioritize projects to ensure deadlines are met and all supplemental materials required are submitted in a timely manner.
- Assemble and submit monthly, quarterly and/or yearly statistical reports for major and individual funders.
- Responsible for evaluation of operational services, including data analysis and dissemination to all relevant parties.

Competencies, Knowledge, Skills and Abilities

- Ability to understand business org-charts and operations.
- Strong analytical skills, business sensibilities and attention to bottom line results.
- Able to operate effectively in a diverse and fast paced work environment.
- Strong work ethic and enthusiasm for connecting Philadelphians to benefits and tax services.
- Outstanding verbal, written and on-line communication skills.
- Proficiency in Microsoft Office, including Word, Excel and PowerPoint
- Demonstrated ability to manage time efficiently and meet deadlines.
- Outstanding integrity, positive attitude, and self-direction
- Ability to generate innovative ideas and effectively communicate them verbally and in writing.
- Ability to comprehend system wide strategy/vision and communicate it to stakeholders.
- Demonstrated ability to move ideas and vision to implementation successfully.
- Ability to travel to various locations throughout the Philadelphia region.

- Project Management driven.
- Possess solid Office 365 and SharePoint experience.
- Ability to maintain confidential information.
- Ability to travel to and between tax site locations and to conferences/events as required.

Qualifications (Education and Experience)

- Bachelor's degree in related field and master's degree preferred with 10 or more years of experience Tax Services< VITA and/or Tax Preparation Software/Systems.
- Five years of supervisory experience
- Extensive experience in tax law, preparation and operations.
- Excellent organizational skills
- Strong work ethic and ability to be mobile.
- Proven ability to lead, motivate and develop staff in both in-person and virtual settings.
- Strong customer service skills, calm demeanor, empathy, patience, pleasant presentation, and a genuine desire to help people.
- Must have clear and effective verbal and written communication skills.
- Commitment to working with multiple partners providing a set of respectful, honest and transparent feedback/recommendation(s).

Supervisory Responsibilities

All Tax Operations Staff fall under the supervision umbrella of this position be it directly or indirectly (i.e. Tax Operation Area Managers, Mobile Team, Site and Assistant Site Managers, Intake Specialist and Volunteers)

Other Specialties, Certifications, Physical Requirements, and Work Conditions

- Regular, predictable attendance is required.
- This position operates in an office setting or works from home and routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.
- Exertion of physical strength to lift, carry, push, pull, or otherwise move objects up to 10 pounds. Work involves sitting, walking, and standing is often necessary in carrying out job duties.
- Ability to learn new things and master new concepts.
- Reliable and punctual
- Comfortable in a chaotic and ever-changing environment
- Attention to detail.
- Customer service skills
- Commitment to the Campaign's mission
- High level of organization
- Friendly and helpful

Acknowledgement

I acknowledge that I have read and accepted this job description. I understand what is expected of me in this position, and I can perform the essential functions as outlined with or without reasonable accommodation. Furthermore, I understand the duties and responsibilities listed in this job are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position. If I have any questions about duties and responsibilities not specified in this job description that I am asked to perform, I should discuss them with my immediate supervisor or Human Resource representative.

Employee Name (Please Print)

Employee Signature

Date