



Campaign For Working Families, Inc. Job Description

Job Title:	Tax Operations Area Manager	Last Updated:	March 2023
Department:	Tax Operations	Primary Manager:	Director of Tax Operations
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 Tax Operations Area Manager is responsible for leading multiple tax sites (5 - 9) This role is responsible for recruiting, staffing, scheduling, site set-up, site operations, and implementing marketing initiatives. This position manages the day-to-day activities of seasonal staff members and volunteers. Drives the operation at each location to maximize the efficiency of Tax Preparer work. Perform site visits with the Site Managers and Intake Specialists to evaluate and identify opportunities to improve logistics, staff morale, and customer service. Accountable for achieving tax return goals. Supports and leads Campaign for Working Families initiatives.

Role and Responsibilities

Relationship Management

- Support in the cultivation of existing tax relationships and develop new partnerships with current and prospective entities to ensure the delivery of high-quality tax services.
- Serve as the primary broker to tax site staff to develop initiatives and programming that will spur the retention of tax filers and staff with CWF.
- Support the development processes and operations to support the facilitation of tax and community partnerships.
- Lead the ideation, development, and sizing/opportunity for improved tax operations for tax filers throughout the Philadelphia and/or Southern New Jersey region(s).

Project Management

- Ensure ongoing programmatic excellence. This includes overseeing implementation of programming, managing timelines and resources to achieve program and organization goals.
- Support the strategic direction of tax operations to ensure successful program systems, operations, and outcomes.
- Support in the development of tax programming and other experiential learning opportunities.
- Coordinate with key CWF staff and external partners.
- Assist in establishing a standard set of defined metrics of success that can be evaluated.
- Assist in leading tax sites efficiency and effectiveness, while monitoring/improving quality assurance and compliance in accordance with IRS regulations.
- Support the recruitment of tax staff and provide training and guidance as needed to ensure staff's success.
- As requested, represent Campaign for Working Families at events and motivate staff, volunteers, partners, and potential partners to understand CWFs mission and goals.

- Participate in strategic planning along with other CWF leaders to ensure the direction of the organization is positioned to achieve its goals and objectives.
- Perform other related duties as assigned in alignment with CWF's mission.

Tax Compliance and Quality Control

- Oversee IRS compliance relative to quality procedures, reviews, and site visits.
- Cross train 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

- Create a welcoming atmosphere for tax customers, staff and volunteers.
- Serve as the central point of contact for all customer service needs and/or inquiries.

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)

- Associate or bachelor's degree in related field or a minimum of 5 years of experience in the tax support and/or services industry.
- Ability to obtain IRS volunteer tax certification at the ADVANCED or higher level.
- Two years of supervisory experience
- Proven ability to lead, motivate and develop staff in both in-person and virtual settings.

Supervisory Responsibilities

Part-time Temporary Tax Site Managers and Assistant Site Managers, Intake Specialists and Volunteers

Other Specialties, Certifications, Physical Requirements, and Work Conditions

- Regular, predictable attendance is required.
- This position operates in an office setting or work 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 concept(s).
- Reliable and punctual
- Comfortable in a chaotic and ever-changing environment
- Attention to detail.
- Effective, clear and courteous customer service skills
- Commitment to the Campaign for Working Families Mission
- High level of organization
- Kind, empathetic and supportive

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