



Campaign For Working Families, Inc.

JOB DESCRIPTION

EMPLOYEE INFORMATION

Job Title:	Assistant Site/Quality Review Manager	Last Updated:	July 2023
Department:	Tax Operations	Primary Manager:	Tax Operation Area Manager
DOL Status:	Full-Time Seasonal	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 Assistant Site/Quality Review Manager supports the Site Manager in managing and coordinating all activities at the Volunteer Income Tax Assistance (VITA) program site. This includes overseeing daily operations, ensuring high-quality tax preparation services, and assisting in volunteer supervision and training. The Assistant Site/Quality Review Manager also steps in as the Site Manager when needed. The successful candidate will have a strong background in tax preparation, excellent quality review skills, proficient organizational skills, and a passion for serving the community. The Assistant Site/Quality Review Manager is an integral part of ensuring the smooth operation of the Campaign for Working Families program site. This position requires a strong understanding of tax preparation, a commitment to serving the community, and a dedication to supporting the high standards of the VITA program.

Role and Responsibilities

- Assist the Site Manager in overseeing day-to-day operations, ensuring an efficient and organized workspace.
- Help manage volunteer schedules, task assignments, and ensure adequate site coverage.
- Assist with volunteer training and support, fostering a welcoming and supportive environment for all staff and volunteers.
- Help oversee tax return preparation for accuracy and compliance with tax laws and VITA program guidelines.
- Assist in handling client inquiries and issues, ensuring high-quality customer service.
- Uphold the integrity and security of all client data and confidential information.
- Assist with record-keeping and report generation in compliance with IRS and VITA guidelines.
- Step into the role of Site Manager as needed.
- Manage the quality review process to ensure tax operation is running efficiently.
- Adhere to and enforce safety protocols and guidelines to ensure a safe working environment.

CUSTOMER SERVICE

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

Competencies, Knowledge, Skills and Abilities

- Previous management or supervisory experience preferred.
- Able to operate effectively in a diverse and fast paced work environment.
- Outstanding verbal, written and on-line communication skills.
- Proficiency in Microsoft Office
- Demonstrated ability to manage time efficiently and meet deadlines.
- Ability to travel to various locations throughout the Philadelphia region.
- High level of integrity with the ability to handle sensitive information with discretion and ensure confidentiality.
- Proficiency in using tax preparation and office software.
- Ability to work flexible hours during tax season, including some evenings and weekends.
- Willingness to undergo VITA and IRS certification training.

Qualifications (Education and Experience)

- Associate degree preferred or a minimum of 2 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

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 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 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