

# VISTA Assignment Description (VAD)

**Title:** VISTA Volunteer Income Tax Assistance (VITA) Financial Education Manager

**Sponsoring Organization:**

**Project Name:**

**Project Number:**

**Project Period:**

**Site Name (if applicable):** Capital Area United Way (CAUW)

**Focus Area(s)**

**Primary:**

**Secondary:**

**Note:**

*If your VAD is not accepted, the State Office will note the reason(s) why here.*

## VISTA Assignment Objectives and Member Activities

**Goal of the Project:**

This position will provide support to CAUW's Community Impact team for the Volunteer Income Tax Assistance (VITA) program from planning through implementation. The VITA program offers free tax assistance to individuals, families, persons with disabilities, the elderly and limited English speaking taxpayers. IRS-certified volunteers provide free income tax return preparation with electronic filing to qualified individuals.

This position will include capacity building functions to promote the financial education component of the VITA program. Job functions may include, but are not limited to, working alongside CAUW staff to grow the financial education resources and awareness within the VITA program, training volunteers in financial education and providing clients with tax-time financial education at VITA sites.

This position will provide support to Impact volunteers and Impact management team by implementing the Community Impact agenda and working closely with the Director of Community Impact and Initiatives, as well as the Community Impact Manager, and community partners to ensure accuracy and consistency in VITA financial education.

### Coordinate with Impact Team during VITA Planning Phase (07/01/2018 – 1/30/2019)

**Member Activities:**

1. Represent CAUW at community events/meetings related to VITA and/or financial capability.
  - a. Attend meetings that will further the agenda of tax-time savings and financial education.
2. Conduct research on best practices around tax-time savings and financial education at VITA sites.
3. With approval, prepare new policies and procedures to replace or supplement current practices.
  - a. Adapt existing policies, modify policies and create new policies on tax-time savings and financial education as needed.
4. Work with CAUW, IRS and Volunteers to develop comprehensive VITA training program.
  - a. Work with community partners to secure location of trainings.
  - b. Schedule and plan curriculum for multiple tax preparation certification trainings throughout fall/winter 2018 with IRS and volunteer trainers.
  - c. Manage volunteer attendance for appropriate trainings offered.
  - d. Attend all training sessions and help to develop curriculum, materials and training locations with volunteer trainers.
  - e. Certify as an IRS volunteer and tax preparer.

## **Support VITA site operations (02/01/2018 – 06/30/2019)**

### **Member Activities:**

1. Support Impact team and other AmeriCorps VISTA to recruit, train and manage over 160 VITA volunteers.
  - a. Coordinate financial education within the existing training curriculum or as a separate training (TBD).
  - b. Review current financial education initiatives in place with VITA (Form 8888, Save You Refund, Geaux Save, Entergy Scratch-off cards at Super tax Day and America Saves Week) to assess their current successes and make changes necessary to grow each initiative.
  - c. Prior to tax season, assess financial education capabilities at each VITA site and make plan for improvement of financial offerings.
  - d. Create a schedule of trainings and offerings of financial education for each VITA site.
2. Support day-to-day VITA site operations.
  - a. Work with Site Coordinators and volunteers on any concerns regarding financial education at their site.
  - b. Increase tax-time savings and financial education at VITA sites through measurable results working with Capital One Savings Champions, BankOn, Jump\$start and community and corporate partners.
3. Coordinate special events such as ad-hoc sites and Super Tax Days.
  - a. Plan and facilitate Super Tax Day with a team of staff and volunteers.
  - b. With the Impact team, coordinate financial education materials to promote at the event, as well as the coordinating of vendors and workshops to promote financial education and awareness.
4. Work closely with AmeriCorps VISTA responsible for VITA Operations.
  - a. Create a VITA toolkit for internal use including training, sites, resources, best practices and other pertinent information to the VITA program.

## **Support in Post-Season (04/15/2019 – 06/30/2019)**

### **Member Activities:**

1. Coordinate with Impact Team for the Volunteer Appreciation Luncheon.
  - a. Provide measurable outcomes on financial education at VITA sites.
  - b. Create Impact Team PowerPoint for luncheon.
  - c. Coordinate Impact Team awards for luncheon.