

VISTA Assignment Description (VAD)

Title: VISTA Volunteer Income Tax Assistance (VITA) Operations Manager

Sponsoring Organization: MCRA

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 growth and expansion of the program, volunteer retention and management and general operating duties associated with VITA. Job functions may include, but are not limited to, working alongside CAUW staff, acting as a researcher, project manager, volunteer recruiter and coordinator, outcome measurement analyzer and grant writer.

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

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

Member Activities:

1. Work with CAUW's Impact team to plan for the 2018/19 tax season.
 - a. Retain current VITA Sites and Site Coordinators.
 - b. Recruit potential sites for expansion of the program into needed areas.
 - c. Recruit new Site Coordinators for the 2018/19 tax season.
 - d. Execute Memorandums of Understanding between Sites, Volunteers and CAUW
 - e. Attend meeting with sites, Site Coordinators and/or CAUW regarding the VITA program.
 - f. Build site schedules using Acuity scheduling software.
2. Volunteer Capacity Building and Management.
 - a. Execute recruitment campaign for potential VITA volunteers.
 - b. Manage volunteer posts and volunteers in Get Connected.
 - c. Coordinate and manage monthly orientation sessions for volunteers.
3. 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 the fall/winter 2018 with IRS and volunteer trainers.
 - c. Manage volunteer attendance for appropriate trainings offered.
 - d. Attend all training sessions and provide assistance to volunteer trainers regarding

- curriculum, materials and training locations.
- e. Certify as an IRS volunteer and tax preparer.

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

Member Activities:

1. Develop comprehensive volunteer management system for over 160 VITA volunteers.
 - a. Organize volunteers, equipment and supplies at each VITA site.
 - b. Integrate Get Connected volunteer management system into existing volunteer tracking methods.
 - c. Serve as Site Coordinator or volunteer tax preparer as needed for new and/or developing sites and events.
 - d. Communicate with Impact Team on the need of volunteers and/or Site coordinators.
2. Develop program plans and infrastructure to support day-to-day VITA site operations.
 - a. Schedule VITA sites operating hours utilizing Acuity scheduling software.
 - b. Make schedule changes as needed.
 - c. Prior to tax season, communicate with each site coordinator on supplies need for operating. Re-order site supplies as needed and deliver to sites.
3. Organize 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. Grow CAUW's VITA presence in rural areas through ad-hoc sites.
 - c. Work with internal marketing team and VITA funders to promote events.
4. Work closely with AmeriCorps VISTA responsible for VITA Financial Education.
 - a. Plan and help implement financial education integration within VITA sites.
 - b. Create a VITA toolkit for internal used including training, sites, resource, best practices and other pertinent information to the VITA program.

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

Member Activities:

1. Work within team setting to execute Volunteer Appreciation Luncheon.
 - a. Provide measurable outcomes from VITA sites.
 - b. Create PowerPoint for Impact Team luncheon.
 - c. Coordinate Impact Team awards for luncheon.
2. Support sites with post-season needs.
 - a. Create system for returning CAUW and IRS supplies to appropriate party.
 - b. Create and execute post-season surveys for sites and volunteers.
3. Support Impact Team with post-season needs.
 - a. Gather final production reports for grant reporting purposes.
 - b. Research grant and/or sponsorship opportunities for the next fiscal year.