



City of Phoenix

VITA Site Coordinator Volunteer Job Description and Responsibilities

The COP VITA Site Coordinator will provide coordination, organization, and supervision of the VITA Site as described below. The Site Coordinator position is a volunteer, temporary position from approximately November through May. This position provides a stipend contingent on the site coordinator meeting the described job responsibilities described below.

Site Coordinator Responsibilities:

- Adheres to the VITA/TCE IRS Volunteer Site Coordinator Handbook, Publication 1084 IRS Quality Site Requirements, Volunteers Standards of Conduct and the city of Phoenix VITA Program Policy and Procedures manual.
- Attends scheduled trainings; city of Phoenix Site Coordinator Orientation (October), Maricopa VITA Network Site Coordinator / Instructor Orientation (November), and city of Phoenix Site Coordinator Training (January). The Maricopa VITA Network Train the Trainer training (November) is optional.
- Required to pass the online IRS certification at Advanced level and complete Site Coordinator training. *Additional certifications such as Military, HSA, and International are optional but highly recommended.*
- Attend scheduled site coordinator meetings (March and May) and attend the VITA Kick Off Event (January) and Volunteer Recognition Event (April).
- Acts as a liaison between the volunteers, sites partners/hosts, and addresses any relevant questions or concerns that may arise. Meets with site hosts before, during and after the tax filing season to plan for and reflect on the season.
- Remains current with the Tax Slayer program (*COP computers will be updated by COP staff*)
- In conjunction with the city of Phoenix recruits and trains volunteers per the operational needs of site.
- Develops an operational schedule and “soft opening” with the assistance of the site host and other site volunteers. *It is highly recommended that the site “soft opening” occurs within two weeks of VITA opening day.*
- Notifies COP program coordinator if site hours change or site closes unexpectedly.
- Communicates with volunteers upon receipt of volunteer roster (from the city of Phoenix) and encourages the volunteers to participate in the sites “soft opening” and the COP VITA Volunteer kickoff event.
- Ensures adequate supplies, forms, and equipment are maintained at tax site and communicates any needs to COP Program Coordinator in a timely manner.
- Displays required IRS signage as prescribed.
- Informs volunteers and site partners about any new and relevant site, tax law or Tax Slayer updates including Quality Alerts issued by IRS.

- Ensures a process is in place to make sure all volunteers who answer tax law questions, prepare, or correct tax returns, and/or conduct quality reviews are certified in tax law and only prepare returns within their certification levels.
- Monitors the site to ensure that quality reviews are being conducted, confidentiality is being maintained, and sufficient time is being allowed for all taxpayers being checked in at the site to receive assistance.
- Confirms that all tax returns are electronically filed with the federal and state in a timely manner and that acknowledgements are being reviewed or confirmed.
- Acts to either correct or resolve issues with rejected returns and contacts the taxpayer(s) if needed and notes the file of action taken within the Tax Slayer software in within 24 hours to 48 hours.
- Maintains organized records of tax returns prepared at the tax site.
- Informs COP program coordinator of any customer complaints or emergency action taken.
- Submits monthly reports (volunteer hours / IRS F13206) to the VITA Program Coordinator by the 3rd of each month.
- Schedules appointments for taxpayers to have taxes prepared at site. *(if applicable)*
- Displays resources related to asset-building and financial education at the site.
- Ensures volunteers are aware of the Volunteer Recognition Dinner and provides volunteers with their appreciation certificate (if available) on the last of the VITA site.
- After each tax session, returns/stores supplies and equipment at site or with COP staff.
- Follows Tax Slayer end of season closure procedures and verifies that all tax preparers accounts are rendered inactive.
- Ensures that only volunteers who are certified to the advanced level assist tax clients with Facilitated Self Assistance (FSA).

I have read and agree to abide by this volunteer job description:

Please sign and date

Print Name: _____