

Title:	VITA Associate – Kalamazoo County – One Year Grant Funded	Group/Team:	Community Impact
Reports To:	VITA Services Director	Status:	Full Time (37.5 hours per week)
FLSA Classification:	Salaried, Exempt	Salary Minimum:	\$43,200/year

POSITION SUMMARY

The VITA Associate is a member of United Way of South Central Michigan's Community Impact team and is responsible for administering the Volunteer Income Tax Assistance (VITA) program in Kalamazoo County. The VITA Associate will oversee VITA services and partner sites within Kalamazoo County during the tax season and operate year-round tax services. This position is housed out of the United Way of South Central Michigan Kalamazoo office. The position is hybrid (remote and in-person) most of the year and in-person in the Kalamazoo office and other locations within Kalamazoo County during tax season.

The position requires frequent travel throughout Kalamazoo County during tax season with occasional travel to Lansing throughout the year for meetings and trainings. Evening and weekend work are required during tax season. **This is a 1-year grant funded full-time position.**

KEY RESPONSIBILITIES/ESSENTIAL DUTIES OF POSITION

- Contribute to an equitable, diverse and inclusive organizational culture that centers people in every solution, process and function.
- Build systems, culture, and processes to create an inclusive and equitable Kalamazoo County VITA program to ensure that all eligible clients are able to access, feel welcomed, and benefit from the VITA program with a focus on eliminating barriers to access for historically underrepresented and marginalized communities.
- Manage the day-to-day operation of the VITA Program in Kalamazoo County.
- Manage the review of tax site compliance with IRS Quality Site Requirements and other IRS guidelines.
- Ensure that all tax returns prepared are transmitted in a timely manner and follow-ups are completed as needed.
- Manage data collection and prepare external reporting as required for tax grants and partners; compile and disseminate program reports, materials, and documents.
- Recruit, train, oversee, and manage listing of volunteers' certifications for program volunteers; deliver and administer volunteer recruitment strategies such as presentations, speaking engagements and events.
- Collaborate and maintain relationships between staff, VITA volunteers, community partners, site coordinators, Internal Stakeholders, Partnerships, Education and Communication Relationship Manager, United Way staff members, Michigan and local 2-1-1 staff members, and clients who are provided VITA services.
- Coordinate financial education classes including the recruitment, scheduling, and oversight of presenters.
- Implement the tools to monitor the financial well-being of VITA clients including completion of Financial Health Surveys by clients to be evaluated to improve programming and referral services for long-term financial well-being and connecting clients to tools such as opening a bank account.

- Respond to or refer client requests that come through the 2-1-1 pipeline or the VITA communications system.
- Prepare Kalamazoo County VITA calendar of events and coordinate VITA volunteer schedules.
- Assist with updates of all software, records, reports, and Standard Operating Procedures (SOP) as needed.
- Coordinate with the VITA Associate Director and IT vendor to address technology issues and distribute, collect, and re-inventory all VITA equipment and supplies and submit requests for purchases as needed.
- Follow site establishment and close out policies and procedures to ensure tax sites can operate efficiently and effectively.
- Develop presentation and training materials, including using PowerPoint and other presentation software.
- Maintain all IRS VITA certifications (Basic, Advanced, etc.) throughout employment.
- Other duties as assigned.

JOB REQUIREMENTS

- Demonstrates a commitment to equity, diversity and inclusion and ability to apply anti-oppressive and anti-racist principles in the workplace.
- Experience in working with low-moderate income individuals and families, nonprofit experience, and volunteer management preferred.
- Ability to pass IRS Advanced Certification Exam required after 30 days of employment.
- Formal education such as a bachelor's degree in non-profit administration, sociology, accounting, finance, business, social work or a related field may substitute or supplement experiences to meet this requirement.
- Ability to cultivate community collaborations and relationships to create access for and accountability to VITA clients and potential clients. Prior non-profit, volunteer management, or tax knowledge and experience preferred.
- Ability to effectively use Microsoft 365 applications including Word, Excel, PowerPoint, Outlook and Teams. Database experience is a plus.
- Commitment to providing client-centered services and performing tasks completely and accurately.
- Strong written and verbal communication skills to communicate effectively with volunteers, community members, and clients that is empathetic, inclusive, supportive, and client centered.
- Ability to respond promptly to UWSCMI staff and VITA volunteer communications during VITA service hours.
- Experience with tax preparation software preferred.
- Ability to handle sensitive case information with discretion, maintaining client confidentiality and privacy.
- Experience with facilitating meetings, public speaking, and providing training.

WORK ENVIRONMENT AND PHYSICAL DEMANDS

- Ability to use office equipment and work sitting in front of a computer for extended periods of time.
- Reliable transportation for frequent travel within the Kalamazoo area and occasional travel to Lansing. Use of a personal motor vehicle for transportation requires proof of insurance and the driver must have a valid Driver's license.



- Occasional light lifting of supplies and materials.
- Ability to work non-standard work schedule (evenings and weekends) as needed during tax season.
- Successful completion of a criminal background check.
- Candidate must be able to work successfully in a remote environment with private space and high-speed internet.

SALARY

All the roles within UWSCMI have pay ranges that commensurate with the knowledge, skills, and abilities of the successful candidate. The minimum annual salary for this position is \$43,200.

ABOUT UNITED WAY OF SOUTH CENTRAL MICHIGAN

United Way of South Central Michigan (UWSCMI) gathers the power of three legacy organizations—Capital Area United Way, United Way of the Battle Creek and Kalamazoo Region, and United Way of Jackson County—to mobilize financial and volunteer resources, partners, and voices, creating equitable and lasting change for the most vulnerable people in our communities.

Our vision: Strong, caring communities where every person is valued, thriving, and connected for the common good.

Our path: Our work lifts our local communities by reducing racial and economic disparities; addressing the needs of ALICE (Asset-Limited, Income Constrained, Employed) households in financial stability, education, health, and basic needs; and creating opportunities for every person to reach their full potential.

EQUITY, DIVERSITY, AND INCLUSION

UWSCMI is committed to dismantling systemic inequities that continue to cause harm for Black, Indigenous, and other People of Color (BIPOC), Lesbian, Gay, Bisexual, Transgender, Queer, Intersex, and Asexual (LGBTQIA+) people, women, and people with disabilities. We believe that these communities must be centered in the work we do. We strongly encourage applications from people with these identities or who are members of other marginalized communities. Together, we will continue to build capacity and accountability into our policies, practices, and partnerships.

NOTE

All duties and responsibilities are essential functions and requirements and are subject to possible modification to reasonably accommodate individuals with disabilities. To perform this job successfully, the incumbents will possess the skills, aptitudes, and abilities to perform each duty proficiently. The requirements listed in this document are the minimum levels of knowledge, skills, or abilities. This document does not create an employment contract, implied or otherwise, other than an “at will” relationship.

BACKGROUND CHECK DISCLOSURE



We require background checks for certain roles. The checks are completed by ProScreening and results are only ever communicated to the Hiring Manager if they may impact someone's employment. We do not use prior arrests, only convictions. These convictions will only be considered as hiring criteria if they are directly connected to the roles & responsibilities of the job (for example, financial related convictions for a finance officer). We know that the criminal legal system is not equitable, and negatively impacts marginalized communities - specifically people of color - at rates much higher than other identities. This is why our background check process is only in place for explicit situations.

TOTAL REWARDS PACKAGE

United Way of South Central Michigan offers a competitive total rewards package including a competitive salary, medical coverage with an employer contribution of 90% towards single coverage and 75% towards dependent coverage, dental and vision with a 90% employer contribution towards single and dependent coverage, life insurance with an employer-paid benefit of 2 times annual salary, short-term disability and long-term disability effective the date of hire. In addition, United Way provides a 10% employer contribution into the 403(b) retirement plan each year with full vesting after 3 years of service and 20 days Paid Time Off, 13 days Paid Sick Time, 5 Paid Volunteer Days, 3 Floating Holidays and 11 Paid Holidays each year (Paid time off, sick time. Paid volunteer time and floating holidays are prorated the first year). Hybrid and/or remote work arrangements are available for many positions.

TO APPLY:

Submit your application online via <https://unitedforscmi.org/careers/> by March 6, 2024.

United Way of South Central Michigan is an Equal Opportunity Employer committed to the principles of equity, diversity, and inclusion.