

## **UNITED WAY of ERIE COUNTY**

### **DIRECTOR OF ERIE FREE TAXES**

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**Department:** Community Impact  
**Reports to:** President

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### **ORGANIZATIONAL OVERVIEW**

United Way of Erie County is a local social impact organization focused on breaking the cycle of poverty in our region.

Our Vision is that the Erie region is a collaborative community of opportunity where ALL students succeed and ALL families thrive.

At United Way of Erie County, we value the differences of ideas, experiences, and individuals without regard to race, religion, color, gender, nationality, sexual orientation, physical challenge, or age. We believe we are strongest when we are most inclusive.

### **POSITION SUMMARY**

United Way Erie FREE Taxes is the vehicle by which the national Volunteer Income Tax Assistance (VITA) program delivers free tax preparation services to eligible individuals and families at the local level. Erie FREE Taxes addresses United Way's aspirational goal of "improving community conditions in measurable and recognizable ways" by providing free tax preparation to lower income working individuals and families, providing financial relief from paid tax preparation.

The Director oversees the coordination, development, and administration of all aspects of Erie FREE Taxes, including planning, organizing, staffing, leading, and evaluating program activities and outcomes. The Director ensures high-quality free tax preparation services by certified volunteers are provided to low-moderate income tax filers in Erie County at multiple and county-wide host tax sites.

Erie FREE Taxes provides direct service to widely diverse populations across the county. The Director is an individual who is keenly aware of, sensitive to, and understands the needs and challenges of these populations, especially low-income and economically disadvantaged who may be at financial risk to enable them to be financially stable and secure, and, ultimately, financially self-sufficient. The Director commits to being readily available to tax filers and volunteers throughout the filing season beyond normal work hours.

The Director is responsible for growing program capacity and maintaining a high market penetration rate. Growth is measured by increases in the number of low-to-moderate wage earners who utilize the service and increases in the number of Earned Income Tax Credit (EITC) recipients and EITC refund dollar amounts returned to Erie County tax filers.

The Director is an internal resource on matters related to poverty, self-sufficiency, and financial literacy education.

Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time.

## **ESSENTIAL FUNCTIONS**

### Program Development

- Identify areas of need
- Address service gaps
- Benchmark growth against industry standards
- Measure patron satisfaction
- Expand markets
- Convey success stories to the community
- Learn best practices
- Ensure full compliance with all IRS program/funding requirements
- Assist in the development of budgets needed to meet funder requirements
- Develop/maintain program policies, procedures
- Develop program expansion strategies, services
- Establish new, maintain existing community partnerships
- Develop, establish new, maintain county-wide host tax sites
- Develop, deliver marketing/community outreach strategies, venues
- Develop, execute community provider grant agreements
- Identify, pursue funding sources via grant writing
- Create data-driven reports for community stakeholders, IRS
- Develop volunteer recruitment strategies
- Recruit community, employer, university program volunteers
- Develop, implement volunteer training program
- Conduct program evaluation

### Operational

- Maintain working relationship with IRS/SPEC territory manager
- Recruit program volunteers, host site partners
- Ensure volunteers are trained, IRS-certified
- Develop county-wide tax preparation site schedules
- Provide adequate volunteer staffing patterns at tax sites
- Develop grant agreements with, ensures full compliance by, Erie FREE Taxes grant-funded providers
- Organize a high profile "Kick-Off" media event to generate pre-filing season publicity announcing the availability of free tax preparation services
- Oversee daily operations of tax sites during filing season
- Conduct VITA site reviews
- Hire paid volunteers as needed
- Assist in the development of content for print/social media, website, marketing/outreach materials
- Conduct community outreach
- Conduct media interviews upon request
- Manage Erie FREE Taxes website content
- Respond to, and address, VITA patron inquiries/requests
- Solicit testimonials from VITA patrons
- Coordinate professional scheduling services

- Develop performance reports as needed

### **OTHER**

- Additional responsibilities/duties as assigned

### **EDUCATION**

- Bachelor degree and/or three (3) years equivalent field experience

### **EXPERIENCE**

- Three (3) years supervisory/administrative experience
- Three (3) years' experience working with low income and diverse populations
- Experience with project management and volunteer recruitment preferred

### **SALARY RANGE**

- \$45,000-\$48,000, dependent upon experience

### **REQUIRED SKILLS**

- Ability to work independently
- Ability to build and maintain relationships with a variety of stakeholders
- Ability to handle confidential information with sensitivity and integrity
- Administrative and management skills
- Ability to foster teamwork
- Excellent organizational skills and attention to detail
- Strong interpersonal skills
- Goal oriented

### **PHYSICAL REQUIREMENTS**

- Moves equipment up to 20 pounds
- Communicates with staff, volunteers, and clients
- Positions self to use office equipment
- Access to reliable transportation

### **WORK ENVIRONMENT**

- Primarily works in climate-controlled office-based setting
- Position may require worker to commute to offsite locations to complete business