



Position Description - United Way VITA (Volunteer Income Tax Assistance) Operations Manager

Job Title: VITA Operations Manager

Classification: Full Time Non-Exempt

Reports to: Senior Volunteer Engagement and VITA Program Manager

Location: Lee, Hendry, and Glades Counties

Starting Salary: \$42,000 - \$45,000 DOE

Application Deadline: August 2, 2024

Submit Cover Letter and Resume: MaryM@UnitedWaylee.org

ABOUT UNITED WAY OF LEE, HENDRY, and GLADES

United Way of Lee, Hendry, and Glades (UWLHG) is a volunteer-driven organization dedicated to improving the quality of life for all people in our community. This is accomplished through fundraising, fund distribution (90+ partners), community building, volunteer advancement, and information and referral. UWLHG is a \$20 million nonprofit social services organization, with 75+ employees in five locations with the main campus being located at 7273 Concourse Drive, Fort Myers, FL. The majority of funding is from private donations although UWLHG also receives local, state, and federal grants.

Summary:

The United Way of Lee, Hendry, and Glades VITA Operations Manager is responsible for engaging with the community, recruiting volunteers, and sharing information about VITA's free tax services and financial education programs. The VITA Operations Manager fosters positive relationships with partner agencies and organizations, ensuring coordination, organization, and communication for VITA site operations. They assist in ensuring that VITA sites run efficiently, volunteers are well-supported, and taxpayers receive the assistance they need during tax season. This role requires an outgoing personality, excellent communication skills, and the ability to work effectively with diverse groups.

Key responsibilities/Essential Functions:

- **Operational Support:** Oversee the setup and logistics for tax preparation sites, ensuring the availability of all necessary equipment and supplies. Ensure VITA sites open as scheduled and are adequately staffed and stocked. Assist as a Site Coordinator or in other capacities at tax sites when needed.
- **Special Events:** Coordinate with community organizations and volunteers to schedule and promote special tax events.
- **Site Inspections and Documentation:** Conduct periodic site visits to assess organization and taxpayer service quality. Ensure that all IRS procedures are followed and maintain the confidentiality of sensitive client documents. Document site activities with photos for end-of-season celebration and reporting purposes.
- **Volunteer Recruitment and Retention:** Assist in the recruitment, onboarding, and training of volunteers for the VITA program. Cultivate a positive and engaging environment to maintain volunteer motivation and satisfaction. Complete the Advanced and Site Coordinator VITA training and certification (training provided).
- **Client Support:** Respond to and return taxpayer calls and inquiries, including scheduling appointments and providing relevant information.

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- **Community Engagement & Outreach:** Cultivate strong relationships with partner agencies, community organizations, and residents to enhance program visibility, increase participation, and extend outreach efforts to a wider audience.
- **Data Collection and Reporting:** Track and report on community engagement activities, volunteer participation, and program outcomes.
- **Emergency Response:** During an Emergency, employees may temporarily be assigned to work and perform duties outside the normal scope of their position, location, and work schedule to fit the needs of the County and its citizens.

Other Duties

This job description is not designed to cover or contain a comprehensive listing of activities, duties, or responsibilities required of the employee. Duties, responsibilities, and activities may change with or without notice.

Direct Reports – None

REQUIREMENTS AND QUALIFICATIONS

- Bachelor's degree or 2 years comparative work experience.
- Positive and energetic demeanor.
- Experience managing volunteers.
- Proficiency in database systems and Microsoft Office Suite: Word, Excel, PowerPoint, and Outlook, with the ability to learn and navigate tax preparation software.
- Strong organizational skills, critical thinking, time management, and problem-solving abilities.
- Strong communication skills, including written, verbal, and interpersonal communication.
- Ability to work independently and in a team environment, taking initiative when needed.
- Ability to handle multiple responsibilities in stressful situations.
- Strong teamwork skills and the ability to work effectively with a diverse group of clients and volunteers.
- Resourcefulness in problem-solving and the ability to make decisive decisions when necessary.
- Willingness to adapt to changing program needs and schedules, including working evenings and Saturdays.
- A genuine passion for community service and a commitment to helping low-income individuals and families access vital tax assistance.

Physical Demands: The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is regularly required to sit for long periods of time, talk, and/or hear. The employee is frequently required to use finger and hand motion and occasionally to stand, walk, and reach with hands and arms. The employee must frequently lift and/ or move up to 30 pounds and occasionally lift and/or move up to 40 pounds. There may be additional physical requirements associated with department meetings/events. Specific vision abilities required by this job include close vision, distance vision, depth perception and ability to adjust focus.

Requires talking, hearing, and visual acuity sufficient to perform these major functions. Occasionally, the work of this position is spent at offsite meetings, or event locations within Lee, Hendry, or Glades County.

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- **Licenses-** Valid Florida Driver's License that meets insurance guidelines-- as some travel to neighboring county may be required.

Work Environment: The work environment characteristics described here are representative of those an employee encounters while performing essential functions of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform essential functions. This job operates in a professional office environment, off-site venues, and outside event areas in various weather conditions. This role routinely uses standard office equipment such as computers, phones, and photocopiers.

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties, or responsibilities required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

This is a full-time position with a typical work schedule from Monday to Friday, starting at 8:00 AM and concluding at 5:00 PM. Please note that evening and weekend events may be required, particularly during training and the tax season, to accommodate the demands of job duties.

United Way is an equal employment opportunity employer and does not discriminate against any person because of race, color, creed, religion, sex, national origin, disability age, genetic information or any other characteristic protected by law. This nondiscrimination policy extends to all terms, conditions, participation in all company-sponsored activities, and all employment actions. United Way will make reasonable accommodations for qualified individuals with known disabilities unless doing so would result in undue hardship.

Terms of employment are subject to satisfactory negative drug testing as part of our drug-free workplace program. Level II background screening will be conducted because of the nature of the position. Applicants may be asked to take an online skills assessment.

Additional Information:

UWLHG is an exceptional workplace that can provide you with:

- Opportunity to work with smart, passionate, and enthusiastic team members and volunteers
- Working with diverse staff and other constituents
- Culture of high-performance expectations and accountability
- Exciting and challenging work
- Opportunity to help solve the community's toughest problems
- Competitive pay that is commensurate with demonstrated successful performance and experience
- Paid Health and Dental Insurance for employee, 401k, and Monthly Accrued PTO

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